

economicprofile

SACRAMENTO REGION

2008/2009



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UCDAVIS
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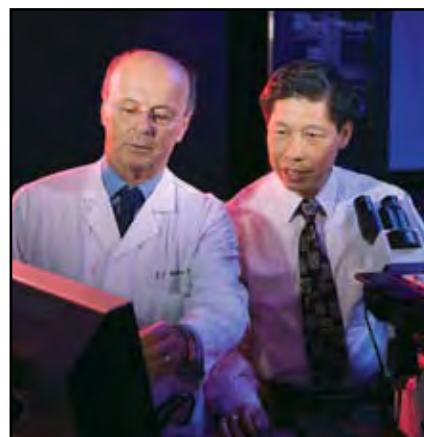
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Lea Received the GIFT of TIME

Lea Spencer was just 36 years old and a married mother of two when she received a devastating diagnosis: cancer. Determined to beat the odds, she entered a clinical trial for a promising new treatment at UC Davis Cancer Center.

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*At UC Davis Health System,
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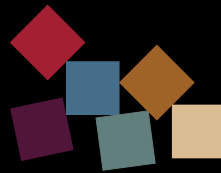
*Drs. Fred Meyers and Kit Lam
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economic profile

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a **note** to our readers

Within these pages we invite you to experience the Sacramento Region — a place where exciting opportunities are being created for its 2.3 million residents and growing businesses.

With one of the strongest economies in California, the Sacramento Region offers a welcoming business climate, an abundant and educated workforce from its world-class research and educational institutions, relatively low housing costs, and excellent schools. A beautiful and healthy setting in which to live and play, the region is filled with trees, rivers, and bike trails, and offers a comfortable climate, cultural attractions, and outdoor activities.

Home to the California State Capital and rich with history and a sense of community, the Sacramento Region is also known for location, location, location. It is just a short drive from world-famous destinations like the Pacific Ocean, Sierra Nevada Mountains, Napa Valley, and Lake Tahoe, and is located just 75 miles east of San Francisco and 375 miles north of Los Angeles.

The six-county Sacramento Region, comprising of El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba counties, has experienced strong population and steady job growth in the last few decades. Population growth is attributed primarily to the migration of residents from other California and U.S. urban areas. The region's job growth is expected to outpace the national average by more than double over the next ten years. This growth is credit to the diversification and strength of the region's economic base — with a shift from primarily government employment to private sector employment that now represents dynamic and expanding industries including high technology, life sciences, healthcare, and clean energy technology. In fact, the renewable energy and clean energy technology industries have been investing in the Sacramento Region at levels never seen before and an increasing number of national and international firms are choosing the Sacramento Region as their base of operations for the U.S.

SACTO invites you to discover the exciting opportunities offered by the Sacramento Region, with the assistance of our confidential services, without obligation.



Barbara A. Hayes
Executive Director
SACTO



growth of the Sacramento Region

The six-county Sacramento Region is one of the fastest-growing metropolitan areas in California. The livability of the region, variety of housing opportunities, economic growth, recreation and culture, and proximity to world-renowned destinations all add to the quality of life of the residents and businesses within the region.



With a unique and increasingly healthy mix of economic opportunities for companies and job seekers alike, many people and businesses are making the move to the Sacramento Region.

POPULATION

The Sacramento Region includes the 26th largest metropolitan statistical area in the United States, roughly similar to the Portland, San Antonio, and Orlando metropolitan areas.

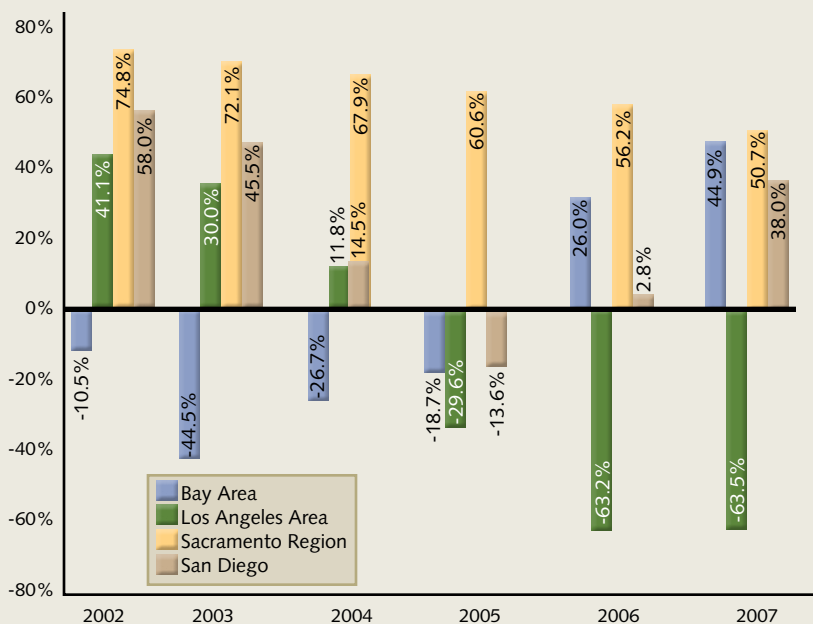
The region has a population of roughly 2.3 million people, including an increase of approximately 380,000 since the year 2000. The attractions of the region, including comparatively affordable land and housing and a high quality of life, plus a rapid increase

in the cost of living in the adjacent San Francisco Bay Area, have ushered in over a decade of unprecedented expansion. During the past 15 years the population grew at an average rate of 39,000 residents per year, and during the last five years the number increased to 41,200 residents per year.

The consistent growth of the Sacramento Region is attributed to its desirability as a great place to live and work, while offering a much lower cost of living than the San Francisco Bay Area, Los Angeles, and San Diego metropolitan areas. As shown in Figure 1, the Sacramento Region compares favorably in net migration with the three other major metropolitan areas in California. During 2007, nearly 51 percent of total population growth in the six-county region was a result of net in-migration. This surpassed San Diego with 38 percent, and the San Francisco Bay Area with 44.9 percent. Note: A negative number indicates a net out migration by that percentage.

Further examination of net migration figures shows a recent historical population shift from coastal to inland regions. In terms of net domestic migration between 2002 and 2007, the San Francisco Bay Area experienced an in-migration of 17,354 residents, and Los Angeles an in-migration of 33,777 residents. At the same time, the Sacramento Region experienced a domestic net in-migration of 175,873 residents, and San Diego added 72,550 residents.

Figure 1: Net Population Migration in Selected Metropolitan Areas (% of growth attributed to migration)



Sacramento Regional Research Institute, August 2008
 Data Source: California Department of Finance, Demographic Research Unit E-6
 County Population Estimates
 Note: Based on July estimates of corresponding year.

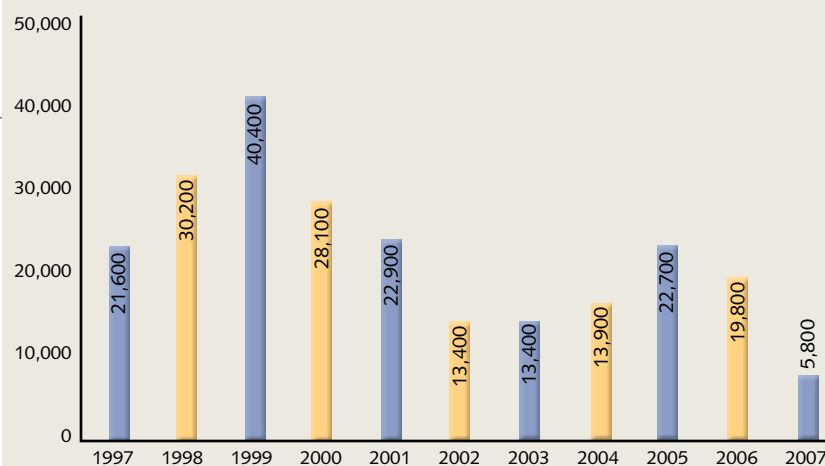
The Sacramento Region's population is projected to grow to nearly 2.5 million by 2012, and 2.7 million by 2017. It is expected to significantly outpace the growth of nearly all other major metropolitan areas in California, as well as California itself. This growth rate is also greater than many of the other major metropolitan areas in the Western United States.

EMPLOYMENT

One of the major strengths of the Sacramento Region is its economic stability. Job growth has historically been very steady, not exhibiting large spiked increases and very rarely suffering from dramatic drops or declines in activity. During the last ten years, a period of statewide and national economic instability, the region grew at an average of nearly 21,000 jobs per year, roughly a 2.5 percent growth rate of the nearly million-strong employment base. Over the long term, the location of the State Capital provides tremendous economic stability, growing at a similar rate as the state's population.

While government employment in the area is important to the stability of the region, as the region grows, the government sector's proportion of total employment is getting smaller. Figure 3 shows a gradual decrease in the percentage of government employment,

Figure 2: Annual Growth in Employment

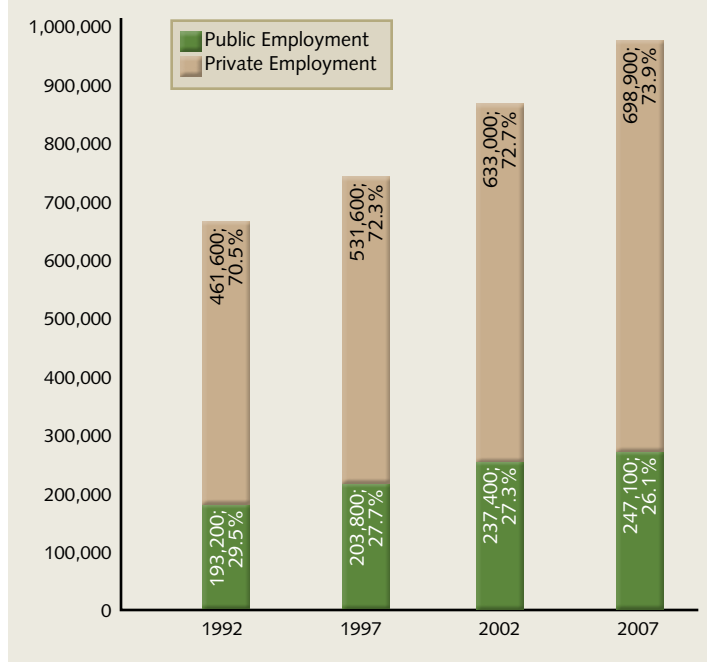


Sacramento Regional Research Institute, August 2008

Data Source: California Employment Development Department, Labor Market Information Division

Note: Data represents change in annual average Nonfarm employment from previous year.

Figure 3: Proportion of Public and Private Sector Employment



Sacramento Regional Research Institute, August 2008

Data Source: California Employment Development Department, Labor Market Information Division



The Sacramento Region is a major beneficiary of inward migration, gaining nearly 6,500 net jobs from the Bay Area and 4,600 from the Los Angeles Region between 1992 and 2004.

The Sacramento Region saw an increase of over 200,000 new jobs, 460,000 new residents, and 143,000 single-family housing units between 1997 and 2007.



compared to total employment: 29.5 percent in 1992 and 26.1 percent currently. This decreasing percentage is not a result of a reduction of government jobs, rather an expansion of private sector employment at a greater rate than government. In fact, during the last ten years, government employment in the region has increased by 43,300 jobs, or 21 percent.

HOUSING

California is not known for its affordable housing and, in many areas, this has created a hurdle for companies to expand or locate an operation within the state. Many of those firms have found the Sacramento Region to be the “California answer” to that difficulty. In addition, the housing market has gone through a dramatic adjustment during the current housing correction, and home prices are more affordable than any time in this decade. At \$259,000, Sacramento median

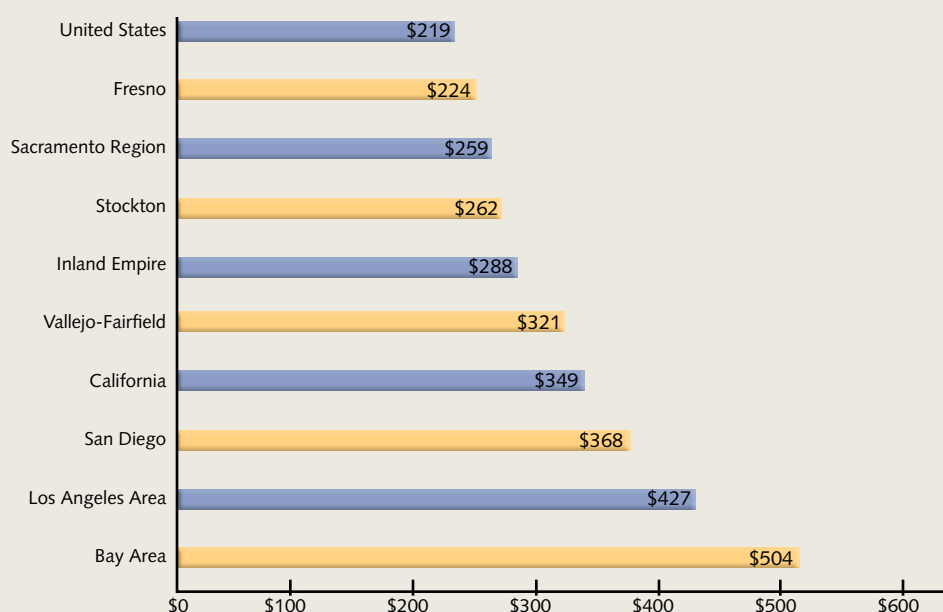
home prices are only 18 percent higher than the national median, 26 percent lower than the California median, and roughly half that of the Los Angeles and San Francisco Bay Areas.

Figure 5 reflects the percentage of households that can afford a median-priced home in various metropolitan areas in California. This clearly shows that the Sacramento Region is the most affordable major metropolitan area in California, which has been an important quality of life factor for companies expanding and locating in the region.

The Sacramento Region surpasses the affordability level of the state by over 22 percent and offers home buyers a variety of housing options.

In addition to single-family attached housing units in the region, the City of Sacramento is experiencing an upswing in new high-density downtown residential demand and projects. There are several thousand units of mid- to high-rise projects planned and under construction in the central business district.

Figure 4: Median Home Price in 1st Quarter 2008 (in thousands)

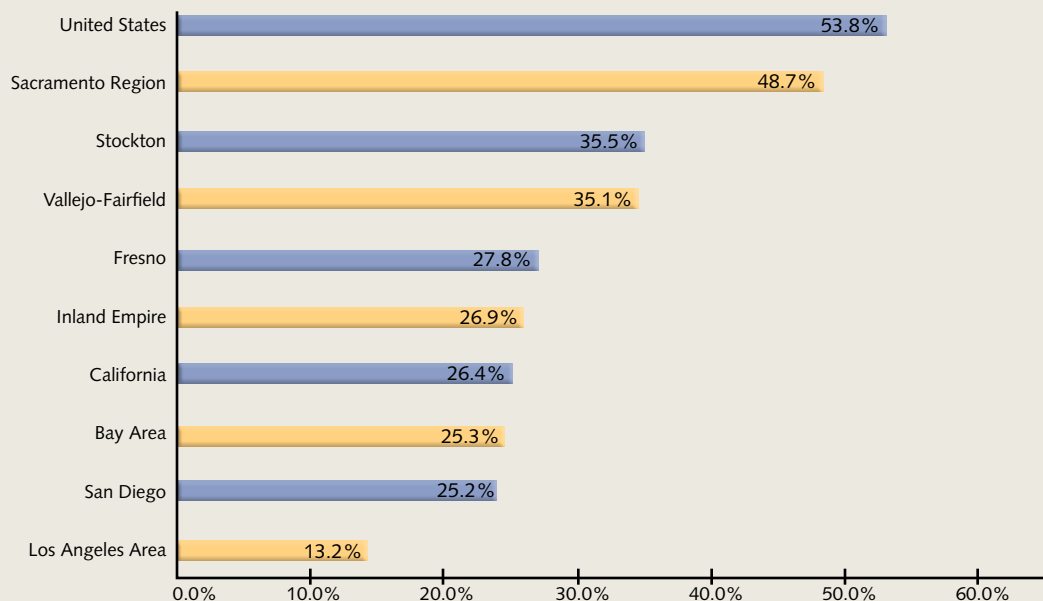


Sacramento Regional Research Institute, August 2008

Data Source: National Association of Home Builders—Wells Fargo Housing Opportunity Index, 1st Quarter 2008

Note: Housing Opportunity Index reflects the share of homes sold during the represented quarter that would have been affordable to a family earning the median income.

Figure 5: Housing Opportunity Index in 1st Quarter 2008

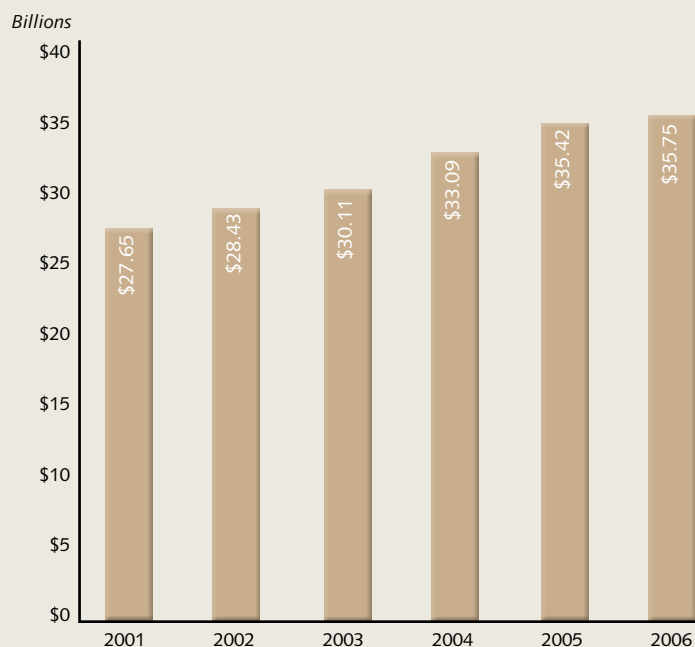


Sacramento Regional Research Institute, August 2008
 Data Source: National Association of Home Builders—Wells Fargo Housing Opportunity Index, 1st Quarter 2008
 Note: Housing Opportunity Index reflects the share of homes sold during the represented quarter that would have been affordable to a family earning the median income.

TAXABLE SALES

Taxable transactions within the six-county region continued to climb at rates exceeding most metropolitan areas and the state. According to the California State Board of Equalization, taxable sales increased by over 29 percent between 2001 and 2006 in the Sacramento Region, while at the same time, California's taxable sales grew by nearly 27 percent.

Figure 6: Taxable Sales



Sacramento Regional Research Institute, August 2008
 Data Source: California State Board of Equalization

The Sacramento Region saw an inflow of almost 259,000 residents from the Bay Area from 1994 to 2004, representing 39 percent of total growth.

employment outlook

The Sacramento Region proudly embraces its historical roots, most notably the discovery of gold that led to the massive migration westward in the mid-1800s, and in turn, the strong agricultural industry that became the heart of California. While still important to the region and state, agriculture and mining jobs have been surpassed by high-growth industry sectors such as Education and Health Services and Professional and Business Services, along with the stability of Government as a major employer.

EDUCATIONAL AND HEALTH SERVICES EMPLOYMENT

The Sacramento Region is rapidly becoming a hub for general and specialized healthcare in Northern California and the California Central Valley. The major healthcare providers in the region are among the largest employers. There are currently 28 major medical centers within the six-county Sacramento Region, operated by healthcare providers such as Kaiser Permanente, UC Davis Health System, Shriners Hospitals for Children, Mercy/Catholic Healthcare West, and Sutter Health System. Major hospital expansion projects are currently

underway including Kaiser's \$500 million expansion at its Roseville campus, Sutter's \$600 million project in midtown Sacramento, and expansions at Mercy San Juan Medical Center and General Hospital.

Education has also been an important driver of employment growth in the Sacramento Region. With a growing and increasingly diverse regional population, the development of new, private, vocational, and college institutions has increased dramatically.

Figure 7: Industry Sector Employment Growth 2002–2007

Industry Sector	Employees 2007	Employees 2002	Employment Growth Percentage Since 2002	Composition 2007	Composition Shift Since 2002
Government	247,100	237,400	4.1%	25.8%	-1.1%
Trade, Transportation, & Utilities	162,200	148,500	9.2%	16.9%	0.1%
Professional & Business Services	114,800	103,700	10.7%	12.0%	0.2%
Educational & Health Services	102,600	83,000	23.6%	10.7%	1.3%
Leisure & Hospitality	90,500	78,800	14.8%	9.4%	0.5%
Construction	69,800	63,400	10.1%	7.3%	0.1%
Financial Activities	64,000	56,500	13.3%	6.7%	0.3%
Manufacturing	43,200	45,000	-4.0%	4.5%	-0.6%
Other Services	30,100	29,600	1.7%	3.1%	-0.2%
Information	20,800	23,400	-11.1%	2.2%	-0.5%
Agricultural	13,000	12,500	4.0%	1.4%	-0.1%
Natural Resources & Mining	1,000	1,100	-9.1%	0.1%	0.0%
Total Employment	959,100	882,900	8.6%		

Sacramento Regional Research Institute, August 2008

Data Source: California Employment Development Department, Labor Market Information Division

Note: Reflects annual average employment.

PROFESSIONAL AND BUSINESS SERVICES

The Professional and Business Services sector has been a consistent driver of the regional economy as the area becomes increasingly attractive to high-level professional organizations catering to the fast-growing population and growing wealth and income of the region's residents.

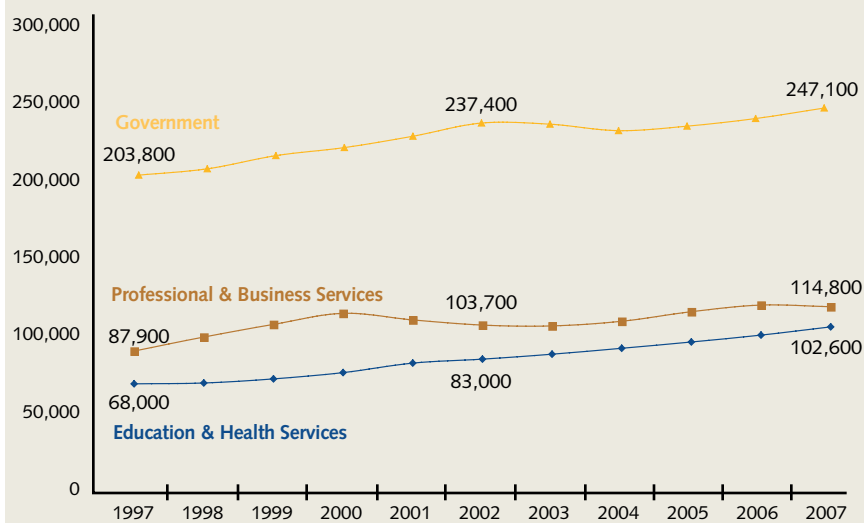
Between 1997 and 2007, the region added 26,900 jobs to this sector, an average of nearly 2,700 jobs per year. The largest portion of these new jobs came in the subsector of professional, scientific and technical services, and the region grew in many cutting-edge industries.

GOVERNMENT EMPLOYMENT

As the headquarter location for the State of California, the eighth-largest economy in the world, and with a \$100 billion-plus budget, the Sacramento Region has a solid base of government employment. Government sector jobs (federal, state, and local) total roughly 26 percent of the total employment base in the Sacramento Region. Even in difficult times when the state is forced to reduce staff levels, government employment offers the area a high level of long-term economic stability. As an example, during the last ten years, Government employment in the Sacramento Region increased by 43,300 jobs, an average of 4,330 jobs per year.

A wide variety of skills is necessary to keep California running. In addition to the State Capitol housing the legislature and Governor's office, nearly all major agencies and departments for the state are located in and around the downtown area. The Sacramento Region serves as the central location for the vast amounts of information to be stored, updated, monitored, and retrieved for departments such as the Board of Equalization, the Franchise Tax Board, the Department of Motor Vehicles, and the California Employment Development Department, to name just a few. Such departments attract and employ a significant number of people in the area of information technology.

Figure 8: Top Sectors Employment



Sacramento Regional Research Institute, August 2008

Data Source: Data Source: California Employment Development Department, Labor Market Information Division



workforce development and education

A bundant and skilled labor has been a major consideration for companies locating to and expanding in the Sacramento Region. High quality educational and training opportunities, relatively affordable cost of living, and a healthy lifestyle bring and keep talented, creative, and motivated employees in the region.

EDUCATION

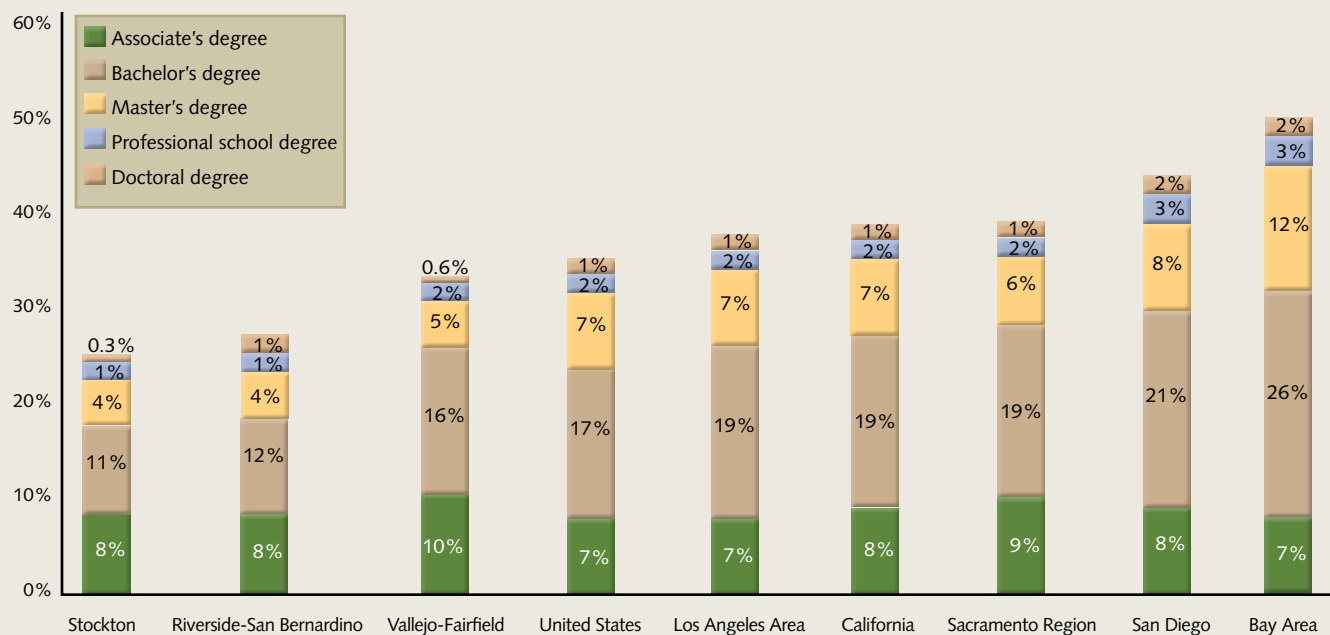
One of the Sacramento Region's most important resources is its rich educational environment. Through a network of public and private schools, the region benefits from a well-educated community and skilled labor force. The Sacramento Region has over 700 schools, from elementary to high school, educating around 400,000 students.

The workforce of the Sacramento Region is highly educated (see Figure 9). Roughly 38 percent of the adult population has a degree of higher education, compared to 34 percent nationwide and 37 percent statewide. In addition to the area's worldclass universities, the Sacramento Region has one of the strongest community college systems

in California. Roughly nine percent of adults in the region have their Associate's degree from a community college and countless others have received specialized training and certification in many different disciplines.

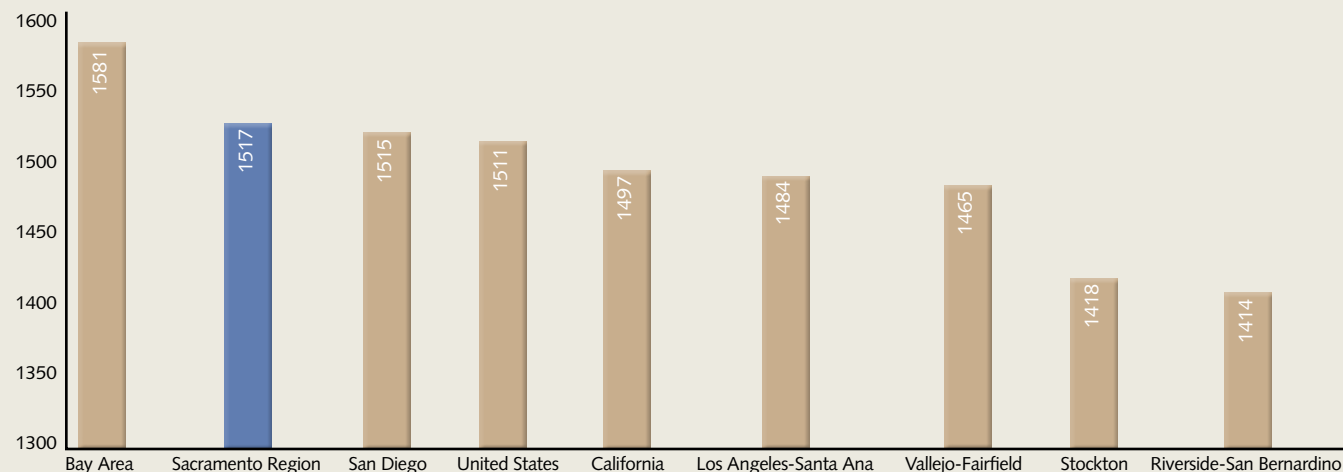
The Sacramento Region's commitment to quality education results in consistently high levels of accomplishment for area students. The region's students have regularly outscored or performed similar to California students on the Scholastic Aptitude Test (SAT). As shown on page 23, the Sacramento Region scored higher in total SAT scores than both the state and the nation. During the last testing period, Yolo County tied for third and El Dorado County ranked fifth in the state in terms of highest overall score.

Figure 9: Educational Attainment in 2006



Sacramento Regional Research Institute, August 2008
Data Source: U.S. Census Bureau, 2006 American Community Survey

Figure 10: Average SAT Scores 2006–2007



Sacramento Regional Research Institute, August 2008

Data Sources: California Department of Education, DataQuest and The College Board Reports

HIGHER EDUCATION

Higher education is available from a variety of institutions throughout the area. The University of California, Davis (UC Davis); California State University, Sacramento (Sacramento State); seven community colleges; numerous vocational schools; professional schools; and local campuses of colleges headquartered elsewhere in the nation provide for the educational needs of local business and the community. Total enrollment at the region's public educational institutions was 173,843 in Fall 2007.

This variety of higher education is a strong attraction point for the region, especially for knowledge and information intensive industries like electronics and biotechnology. With a local education network to tap, firms such as NEC Electronics and Hewlett-Packard in Roseville, Northrop Grumman in Sacramento, and Intel in Folsom, have been able to work closely with local colleges to recruit quality employees.

UNIVERSITY OF CALIFORNIA, DAVIS

UC Davis is one of the nation's top public research universities, with a tradition of service to the region, nation, and the world. UC Davis, which celebrates its centennial in 2008, is a pioneer in interdisciplinary problem solving. Its four colleges, five professional

schools, more than 100 academic majors and 86 graduate programs provide a comprehensive, rigorous and research-based learning environment for students, faculty, and researchers. The 30,000-student, 5,300-acre university has its main campus in the Sacramento Valley, near the state capital and the San Francisco Bay Area.

Founded in 1908 as the University Farm amid the fertile fields of the State's Central Valley, UC Davis has emerged as an acknowledged international leader in agricultural, biological, biotechnological, food, and environmental sciences, and is gaining similar recognition for excellence in the arts, humanities, social sciences, engineering, health sciences, law, and management.

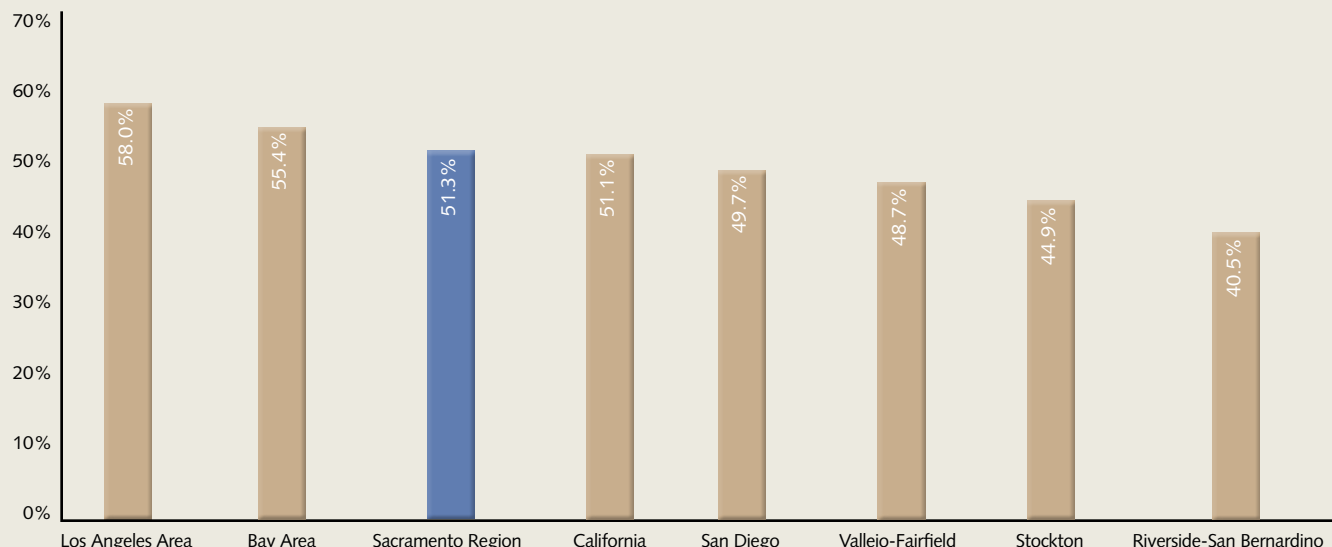
One of 10 campuses in the University of California system, UC Davis ranks 10th among U.S. universities based on contributions to society (*Washington Monthly*), 16th in research spending among public universities nationwide (National Research Council). It is one of 62 North American universities admitted into the prestigious Association of American Universities. *U.S. News & World Report* ranked UC Davis 11th, overall, among public universities nationwide.



Recently-located educational institutions:

- Drexel University
- The Art Institute of California-Sacramento
- Kitchen Academy
- Unitek Education
- International Academy of Design & Technology
- Universal Technical Institute

Figure 11: 2006 Percentage of High School Graduates Enrolling in Public Universities



Sacramento Regional Research Institute, August 2008

Data Sources: California Postsecondary Education Commission

UC Davis Health System is one of five health systems within the University of California. It is an integrated, academic health system consisting of the UC Davis School of Medicine, the 577-bed acute care hospital and clinical services of UC Davis Medical Center, and the 800-member physician group known as UC Davis Medical Group. The health system also includes a National Cancer Institute-designated cancer center, a comprehensive children's hospital, and a level I trauma center. In 2007, the health system was named one of the 100 most highly integrated health networks in the United States.

UC Davis School of Medicine is ranked 44th among U.S. medical schools in research funding from the National Institutes of Health. It is ranked by *U.S. News and World Report* among the top 50 medical schools in the nation for both primary care and research. The school operates the largest family nurse practitioner and physician assistant training program in California. The UC Davis School of Veterinary Medicine, the only public veterinary school in the State, consistently receives top recognition nationally among its peers. The University's General Library, containing more than 3.29 million volumes, is ranked among the top research libraries in North America.

CALIFORNIA STATE UNIVERSITY, SACRAMENTO

Sacramento State offers life-changing opportunities for its students, preparing them to be leaders in their professions and communities. And it is a great higher education value. Undergraduate fees for 2008–09 are just \$1,779 per semester.

The university enrolls a multicultural student body of more than 28,000 undergraduates and graduate students. Professors are known for their excellent teaching, and nearly all hold the highest degree available in their fields.

Students at Sacramento State choose from more than 60 majors and 40 minors. Some of the larger academic programs include teacher education, business, computer technology, criminal justice, psychology, and communication studies. The university also recently launched its first independent doctorate in higher education leadership. Students interested in public service find that many campus programs have strong links to state government that can lead to unique research, internship, and job opportunities. Among them are Sacramento Semester and the highly competitive Capital Fellows Program. Offerings such as the General Education Honors Program help students meet others with similar academic interests and develop even closer ties with professors.

The Sacramento Region's public four-year institutions and community colleges granted over 22,000 degrees in 2006–2007.

Preparing for a career is a vital part of a Sacramento State education. The university has one of the largest cooperative education programs in California, placing students in paid positions where they receive academic credit. Hundreds of other students participate in business- and government-related internships. One in three Sacramento State students work as volunteers—many through a service learning project in class—gaining valuable work experience while helping their community. The campus Career Center helps students both with finding a career interest and with job searches.



Outside the classroom, there are many activities centered on campus and plenty of cultural and entertainment opportunities in the surrounding area. More than half of students join at least one of 250 student organizations, and thousands participate in the recreational sports program. In intercollegiate athletics, Sacramento State competes at the Division I level and sponsors about 400 student athletes. Boating and other water sports are offered at Sacramento State's Aquatic Center at nearby Lake Natoma.

Sacramento State's beautiful 300-acre campus features lush landscaping and some 3,000 trees. Miles of trails stretch along the nearby American River Parkway, linking the campus and student housing with recreational areas such as Folsom Lake and Old Sacramento.

The university is looking to the future with a major campus initiative—Destination 2010.

Included in the planning are new on- and off-campus student housing and a large student recreation center. Current and future students will benefit from the changes and improvements to the academic program, student services, and facilities.

COMMUNITY COLLEGES

The Los Rios Community College District has nearly 85,000 students enrolled at American River College, Cosumnes River College, Sacramento City College, and Folsom Lake College. It continues to rank as one of the top community college districts in the state in enrollment growth and by the number of students that transfer to the University of California and California State University systems. The district offers more than 70 career and education programs in such high growth career fields as nursing and health, computer information science, early childhood education, architecture, and business. It operates the Training Source, a division that provides custom-designed training for businesses in such areas as specialized computer applications, organizational leadership, and supervision management, as well as operating the Greater Sacramento Small Business Development Center and the Center for International Trade Development. Working with business and industry to meet the region's educational needs, the district has expanded Sacramento City College's nursing education program through an innovative partnership with Sutter Health and has developed a GreenForce Initiative to support the growing "green" technology sector. In addition, with the rapid growth of the life sciences in the region, American River College is home to the North Valley and Mountain Biotechnology Center and the college's



electronics program is recognized as one of the best in the state.

Sierra College is a fully accredited, two-year community college that serves Placer, Nevada, and portions of El Dorado and Sacramento Counties. The 300-acre main campus is located in Rocklin, in addition to the 105-acre Sierra College Nevada County campus in Grass Valley, a center in Truckee, and a satellite campus in Roseville. Sierra College has a national reputation based on excellence in such academic areas as computer science, mathematics, computer-integrated electronics, nursing, and early childhood education. It ranks first in California in the number of Associate degrees awarded and has the only nationally accredited Student Health Center. Sierra currently enrolls approximately 19,000 students.

The Yuba Community College District (YCCD) serves students in all or part of eight counties (Yuba, Sutter, Colusa, Lake, Yolo, and portions of Butte, Glenn, and Placer). YCCD spans nearly 4,200 square miles of territory in rural, north-central California, making it one of the largest community college districts geographically in the state. YCCD has three campuses, Yuba College in Marysville, Woodland Community College and the Clear Lake Campus, in addition to outreach

operations at Beale Air Force Base and at various locations in Colusa County. Moreover, thanks to the passage of Measure J, YCCD will be adding outreach facilities in Sutter and Colusa Counties in the near future to better serve the educational needs of students from those areas. YCCD currently provides a quality education to about 16,000 students annually. YCCD offers vocational certificates and associate degrees in over 60 program areas, has an elaborate transfer curriculum, and boasts a robust distance education program (online and televised classes).

VOCATIONAL PROGRAMS

In addition to the comprehensive instruction given at the area universities and community colleges already mentioned, a wide variety of technical and vocational training and degree programs are available at more than 100 vocational schools and universities in the Sacramento Region. A sampling of these institutions includes DeVry University, Heald College, International Academy of Design & Technology, ITT Technical Institute, Institute of Technology, Kitchen Academy, MTI College, The Art Institute of California, Unitek College, Universal Technical Institute, and Western Career College.

The Sacramento County Office of Education operates Regional Occupational Programs that train high school students and adults for careers in the building trades and construction; finance and business; health science and medical technology; hospitality, tourism, and recreation; marketing, sales, and service; public services; and transportation.

PRIVATE FOUR-YEAR INSTITUTIONS

The region is supported by numerous campuses of private colleges headquartered outside of the Sacramento Region, ranging in enrollment from several thousand to smaller

colleges with under 100 students. Some of the larger colleges are featured below. Other smaller institutions include the University of San Francisco, University of Southern California, and St. Mary's College.

Founded in 1939 and located on 128 acres in Rocklin, William Jessup University is the only WASC-accredited private four-year residential university to have its main campus located in the greater Sacramento area. Construction is underway for a \$25 million campus expansion, its first major expansion since the university relocated to Rocklin from San Jose in 2004.

Chapman University, established in 1861, has operated in the Sacramento Valley for more than 20 years. They offer undergraduate, graduate, certificate, and education credential programs at campuses throughout California and Washington, including three locations in the Sacramento Region with an enrollment of 3,500 students.

Golden Gate University, founded in 1901, is the fourth-largest private university in California. The 35-year-old Sacramento campus has an enrollment of 425 students and offers fast-track undergraduate and graduate degrees in management, accounting, business, taxation, law, information technology, and more. Flexible class schedules are geared toward working professionals.

National University is the second-largest private, non-profit university in California. National University's Sacramento campus offers a wide variety of online and on campus undergraduate, graduate, credential, certificate, and extended learning programs.

Because of its fast-growing population and increased workforce needs, the Sacramento Region is a desirable location for educational institutions to establish campuses. Beginning in January 2009, Drexel University, a

Philadelphia-based institution recognized as a leader in higher education innovation, will offer five master's programs and will add four more in September 2009. The programs are intended to address the schedule needs of working adults and will be offered in downtown Sacramento. The university has created a \$10 million fund to financially assist students in the region.

LAW SCHOOLS

With an enrollment of just under 600 full-time students, the University of California, Davis School of Law is among the best small public law schools in the nation and consistently appears in the top tier of *U.S. News & World Report* rankings. Its areas of strength include business law, criminal law and procedure, environmental and natural resources law, health care law and bioethics, human rights and social justice law, intellectual property law, international law, and public interest law. In addition to Juris Doctorate degrees, the law school also offers joint JD/MBA and JD/MA degrees in conjunction with the UC Davis Graduate School of Management, a one-year LL.M. program for international studies, certificates in public service law and environmental law, and clinical programs in a wide variety of subject areas. The faculty consists of 77 nationally and internationally distinguished professors, attorneys, and visiting lecturers. Construction is currently underway on a \$30-million expansion and renovation project to modernize and expand the law school by 18,800 square feet, an increase of about 29 percent. It will also renovate 26,145 square feet of existing space. New construction is scheduled to be completed in the fall of 2009, and renovation work will begin a year later.



The University of the Pacific, McGeorge School of Law is a recognized leader in legal education with a global reputation for its leadership in international law. Its 13-acre campus in Sacramento, devoted exclusively to legal studies, is located three miles southeast of the Capitol. McGeorge offers both full-time and part-time programs with day and evening classes to allow people with employment or family responsibilities to pursue the study of law. Specialized curriculum options at the law school permit students to earn concentrations and certificates awarded concurrently with the Juris Doctorate degree. Certificates include advocacy, government law and policy and international legal studies, and concentrations include criminal justice, intellectual property, and tax. Additionally, LL.M. degrees may be earned in any of several specialties including transnational business practice, teaching of advocacy, and government law and policy.

Also located in the region is Lincoln Law School, which is fully accredited by the Committee of Bar Examiners of the State Bar of California, and serves about 270 students with evening classes. In addition, the University of Northern California, Lorenzo Patiño School of Law, is located in downtown Sacramento near the State Capitol, the U.S. District Court, and the 3rd District Court of Appeals. The Lorenzo Patiño School of Law is licensed by the California State Department of Education to grant Juris Doctorate degrees and Paralegal certificates.

SACRAMENTO TRAINING AND RESPONSE TEAM (START)

START is a partnership of regional economic development, business, education, labor, and government organizations dedicated to assisting businesses locating or expanding

in the Sacramento Region. The START team provides assistance to businesses located in Alpine, El Dorado, Nevada, Placer, Sacramento, Sierra, Yolo, and Yuba Counties. Services include one-stop convenience for regional area employment needs including:

- » Providing labor market information
- » Recruiting, screening, and referring qualified employees
- » Offering practical information on tax credits, enterprise zones, and training wage reimbursements
- » Assisting small business start-ups
- » Identifying testing and interviewing facilities
- » Distributing job openings to more than 300 locations

START Members Include:

- » Central Labor Council
- » City of West Sacramento Economic Development
- » Employment Development Department/ Labor Market Division
- » Golden Sierra Job Training One Stop Career Centers
- » Los Rios Community College District
- » Placer County Office of Economic Development
- » Sacramento Area Commerce and Trade Organization
- » Sacramento City Office of Economic Development
- » Sacramento County Department of Human Assistance
- » Sacramento County Office of Economic Development
- » Sacramento Metropolitan Chamber of Commerce
- » Sacramento Works, Inc./SETA
- » Yolo County Department of Employment & Social Services

greater sacramento regional workforce system

The local Workforce Investment Boards are responsible for uniting business, education and public agencies to assure qualified and trained workers are available to meet the needs of the region's economy.

BUSINESS RESOURCES AVAILABLE:

- » Recruitment Services
- » Assessment for Job Preparedness
- » Database of Job Ready and Skilled Applicants
- » Interview and Orientation Space
- » Interview and Meeting Facilities, Phone, Fax, Copier
- » Interview Scheduling
- » On-the-Job Training and Work Experience Certificates

The Sacramento region has four local Workforce Investment Boards that work cooperatively with the business community:



Sacramento Works, Inc.
Ms. Kathy Kossick, Executive Director
(916) 263-3800
www.seta.net



Golden Sierra Workforce Investment Board
Placer, Nevada, El Dorado, Sierra and Alpine Counties
Mr. Jason Buckingham, Executive Director
(530) 823-4631
www.goldensierra.com



North Central Counties Consortium Workforce Investment Board
Sutter and Yuba Counties
Mr. Stewart Knox, Executive Director
(530) 822-7145
www.northcentralcounties.org

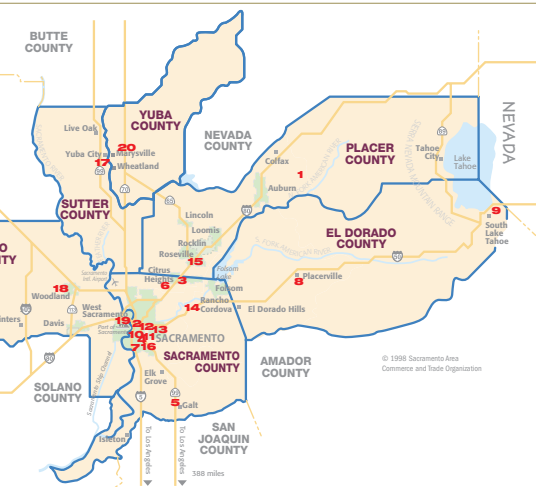


Yolo County Workforce Investment Board
Ms. Teri Ruggiero, WIB Director
(530) 661-2632
www.yoloworks.org

GREATER SACRAMENTO REGIONAL ONE-STOP CAREER CENTERS

- | | |
|--|--|
| <p>1 AUBURN ONE-STOP CAREER CENTER
11548 E Ave.,
DeWitt Center
Auburn, CA 95603
(530) 823-4631</p> <p>2 BROADWAY
915 Broadway
Sacramento, CA 95818
(916) 324-6202</p> <p>3 CITRUS HEIGHTS
7011 Sylvan Road, Suite F
Citrus Heights, CA 95610
(916) 676-2540</p> <p>4 FRANKLIN
7000 Franklin Blvd.,
Suite 540
Sacramento, CA 95823
(916) 262-3200</p> <p>5 GALT
1000 C Street,
Suite 100
Galt, CA 95632
(209) 744-7702</p> <p>6 GREATER SACRAMENTO URBAN LEAGUE
3725 Marysville Blvd.
Sacramento, CA 95838
(916) 286-8600</p> | <p>7 HILLSDALE
5655 Hillside Blvd., Suite 8
Sacramento, CA 95842
(916) 263-4100</p> <p>8 JOB ONE CAREER CENTER
4535 Missouri Flat Rd., #1A
Placerville, CA 95667
(530) 642-5505</p> <p>9 JOB ONE CAREER CENTER
1029 Takela Drive, #5
South Lake Tahoe, CA 96150
(530) 543-6740</p> <p>10 LA FAMILIA COUNSELING CENTER
5523 34th Street
Sacramento, CA 95820
(916) 452-3601</p> <p>11 LEMON HILL
5451 Lemon Hill Avenue
Sacramento, CA 95824
(916) 433-2620</p> <p>12 MARK SANDERS COMPLEX
2901 50th Street
Sacramento, CA 95817
(916) 227-1395</p> |
|--|--|

- 13 MATHER**
10638 Schirra Ave.
Mather, CA 95655
(916) 228-3127
- 14 RANCHO CORDOVA NEIGHBORHOOD CENTER**
10381 Old Placerville Road, Suite 150
Sacramento, CA 95826
(916) 255-3255
- 15 ROSEVILLE ONE-STOP CAREER CENTER**
1880 Sierra Gardens,
#100
Roseville, CA 95661
(916) 744-4057



- 16 SOUTH COUNTY**
8401 A Gerber Road
Sacramento, CA 95828
(916) 525-4717
- 17 SUTTER COUNTY ONE STOP**
256 Wilbur Ave.,
Yuba City, CA 95991
(530) 822-5120
- 18 YOLO COUNTY ONE STOP**
25 N. Cottonwood Street
Woodland, CA 95695
(530) 661-2750
- 19 YOLO COUNTY ONE STOP**
500-A Jefferson Blvd.
West Sacramento, CA 95605
(916) 375-6200
- 20 YUBA COUNTY ONE STOP**
1114 Yuba Street
Marysville, CA 95901
(530) 749-4800

office and industrial real estate

As the Capital of California, the Sacramento Region has historically had a large government sector at its core. The Sacramento Region's strong private sector business growth and development can be traced to 1980, when the population of the region reached one million. This was considered the true turning point of the regional economy, where private investment and commerce expanded at an increasingly rapid pace around the solid economic foundation of the state capital. Since that point, the region has been one of the fastest-growing in the nation. The region is currently home to more than 2.3 million people and it is expected to reach 3.0 million people by the year 2025. Over the past ten years, the region has grown by 25 percent. This explosive growth has translated into a dynamic marketplace from a real estate perspective, and several factors have contributed to this diverse real estate market.

The overall growth of California: California continues to be an economic powerhouse globally, now the eighth-largest economy in the world. As the headquarter location for this economic engine, the Sacramento Region has been receiving an increasing amount of interest and investment from outside of the state and the country. This interest revolves around the many advantages the region's location affords including access to state policy-makers and an infrastructure that is conducive to future growth.

The growing diversification of the Sacramento economy: The Sacramento Region continues to diversify its economic base. The first wave of major high technology facilities to move to the area took place in the 1980s. These included Hewlett-Packard; NEC Electronics America; Apple Computer, Inc.; and Intel Corporation. These companies continue to thrive in the Sacramento Region and have

played a large role in the growth of several of the communities within the region. The latest sector is a growing number of clean energy technology companies including SunTechnics, Ecostream USA, SMA America, OptiSolar, Pacific Ethanol, and Enfinity Corporation. They represent the emerging international concentration of clean energy technology companies that have found the Sacramento Region to be the optimal location to enter the U.S. market, providing all the necessary corporate functions, including management, distribution, manufacturing, and sales and marketing.

OFFICE REAL ESTATE

In 1990, the Sacramento office market had a base of 30 million square feet. Since then, the Sacramento Region added nearly 50 million square feet of new office space while keeping vacancy at low to moderate levels consistently. The Sacramento Region maintained Class A suburban lease rates lower than all other major metropolitan areas in California.

AN EMERGING SKYLINE

Downtown Sacramento continues to experience an economic renaissance, and developers are increasing the density of new projects. The 25-story U.S. Bank Tower is one of several new high-rise buildings





in downtown Sacramento. The 24-story Tsakopoulos building, also located in downtown Sacramento, is currently under construction and is expected to be completed in Spring 2009. Across the river in West Sacramento, the California State Teachers' Retirement System (CalSTRS) headquarters is near completion on its 14-story tower. Just north of downtown, a 12-story building is under construction, adding to the ever-changing skyline. This building, along with the CalSTRS headquarters will be LEED-certified; it is also California's first LEED-certified high-rise built by a private developer.

BUILDING A GREEN CITY

The Sacramento Region has consistently ranked in the top ten metropolitan areas in the U.S. for the number of LEED-certified buildings. This has been led by the State of California, with the bulk of their LEED-certified projects located in the Sacramento Region. In fact, the inland Northern California Region is home to 55 percent of all LEED-certified projects being executed by the Department of General Services.

OFFICE MARKET OUTLOOK

The Sacramento Region experienced record-breaking office investment transactions during the last few years. Private and institutional investors see the region as one of the key locations in the nation for fast-paced development in the new economy. *Business 2.0* magazine recently identified the Sacramento Region as one of the next "Boom Towns," further defining it as having a rapidly expanding base of knowledge workers and

the foundation for successful economies in the near future. These workers, also referred to as the creative class, are being trained and educated by the Sacramento Region's world-class educational institutions. They are drawn by the high quality of life and relatively low cost of living.

PRESENT STRENGTHS OF THE OFFICE MARKET

Seismic Stability — Due to the Sacramento Region's very low risk of earthquakes, many back office operations include data centers with mission critical systems.

Proximity to State Capital — The State of California and many government-related businesses and organizations lease millions of square feet of privately owned office space throughout the region.

Access to Affordable and Executive Housing — The Sacramento Region remains the most affordable major metropolitan area in California and also offers a variety of executive housing options.

Proximity to Interstates and Sacramento International Airport — The centrally located Sacramento International Airport is within ten miles of downtown Sacramento and 25 miles from most of the metropolitan region. In addition, three transnational freeways (I-5, I-80 and Highway 50) intersect in the downtown area.



Sacramento was named one of the "Top 10 Fast Cities" (emerging hubs for creative talent) by Fast Company (2005).

FUTURE STRENGTHS OF THE OFFICE MARKET

Quality Corporate Headquarters Location

— Sacramento has historically been an upper-tier metropolitan area for more labor-intensive administrative and call center locations. The region is now attracting the head offices of these operations as the commercial prestige of the region has become widely recognized.

Overall Cost Advantages — As California metropolitan areas such as the San Francisco Bay and Los Angeles areas regain their economic strength, Class A office lease rates in those areas will rapidly return to high levels and those differences will again become a driving force for firms that are focusing on their bottom lines to consider leasing space in the Sacramento Region.

INDUSTRIAL REAL ESTATE MARKET

The Sacramento Region has a strong history of manufacturing and distribution and has defined industrial real estate in many respects. Certain types of warehouse facilities were first utilized in Sacramento, Woodland, West Sacramento, and other areas with strong ties

to industrial users, and these facilities were tied to the western terminus of the original transcontinental railway. With its location in California's Central Valley, the largest producer of agricultural products in the world, food processing became an important economic driver. In the 1960s, with the rapid expansion of northern California's population, the strong transportation infrastructure and central location in the state, the Sacramento Region became a key distribution hub for major corporations.

The latest wave of industrial activity involves both manufacturing facilities and distribution centers. Many manufacturers have been lured to the region by its highly skilled and trained workforce and its relatively low business costs. Distribution centers take advantage of the convenient and cost-effective access to major markets throughout California and the Western United States.

SACRAMENTO REGION INDUSTRIAL FACTS

The Sacramento Region's total warehouse inventory totals over 180 million square feet, with 2 million square feet added to the market within the last year. Since 1999, the region has added roughly 14 million square feet of industrial space. Vacancy is currently at around 11 percent.

The Sacramento Region has the most affordable lease rates for all industrial facilities space in the Western United States with an average of \$0.55 per square foot per month triple net rent. Orange County is 42 percent higher, Phoenix is 56 percent higher, and Oakland is 84 percent higher than the Sacramento Region.





PRESENT STRENGTHS OF THE INDUSTRIAL MARKET

Port of Sacramento — Located in West Sacramento, the Port of Sacramento is a deep water channel sea port, connecting the San Francisco Bay Area and Pacific Ocean with the Sacramento Region. The Port of Sacramento also has the ability to connect directly with products coming into the Port of Oakland because of a partnership between the port authorities.

Former Military Installations — The Sacramento Region offers three major privatized military installations, each with their own unique aspects and incentives: McClellan Park, Mather Park, and Depot Business Park. McClellan offers a variety of industrial, hangar, and office space opportunities, in addition to an airstrip. As a former Strategic Air Command facility, Mather Park offers land and buildings for office and light manufacturing uses and an 11,000-foot-long runway for corporate jets and cargo-related uses. These two former military installations are considered Local Area Military Base Reuse Areas (LAMBRAs) and have several available incentives associated with them. Depot Business Park, another former military base in South Sacramento, also has similar incentive opportunities available because it is located within an Enterprise Zone. This location is predominantly industrial but also features a renovated office complex and rail access potential.

Access to Resources — Located at the confluence of the Sacramento and American Rivers, the region has access to commercial quantities of water at a relatively affordable cost.

Affordable Living — The Sacramento Region enjoys a high quality of life at a relatively low cost. The variety of housing options for employees creates a very positive business environment for companies that are searching for employees of all skill levels.

Access to Major Markets — Located at the heart of the state, the region offers quick access to the largest markets in California and the Western United States. Los Angeles is roughly 375 miles south on Interstate 5, and the San Francisco Bay Area is roughly 75 miles southwest and can be accessed via several routes.

FUTURE STRENGTHS OF THE INDUSTRIAL MARKET

Due to high costs and geographic boundaries of the coast, the entire central valley of California will be the fastest-growing region in California for the next several decades. Direct access to the California markets and the need to locate in a cost-effective major metropolitan area attracts companies to the Sacramento Region.

California has led the way in scientific and technological innovation, and the epicenter of that innovation and investment has been the San Francisco Bay Area. Many research efforts are now giving way to commercial products, and the Sacramento Region is benefiting from the real estate requirements for manufacturing and development, as well as further cost-effective research efforts. The Sacramento Region's location provides easy access to headquarters and investment sources in the Bay Area.

With the location of UC Davis, Sacramento State, and numerous community colleges and private institutions, the Sacramento Region is becoming a center for cutting-edge research and development, creating an ever increasing need for specialized tech space.



leading industries

In addition to the Sacramento Region's strengths for traditional businesses, including lower costs, a positive business climate, and high quality of life, the region is seeing a new wave of technology companies moving to the area to take advantage of an entirely new set of competitive advantages. These advantages include strong educational and research institutions, location of the State Capital, proximity to the San Francisco Bay Area, an emerging venture capital network, premier sites and facilities, and a qualified technical workforce.

CLEAN ENERGY TECHNOLOGY

The Sacramento Region has emerged as a national hub for renewable energy research and development. The area hosts over 100 "green" firms and organizations, most with their headquarters in the region. Some of the characteristics that make the region fertile ground for this industry cluster are:

1) Several excellent universities and community colleges are located within the Sacramento Region. UC Davis hosts several world-class research efforts including the Institute for Transportation Studies, the UCD Energy Efficiency Program, and the California

Wind Energy Collaborative, to name a few. All of these research programs are blending in with the core UCD life science programs for the development of new biomass energy technologies.



"The Sacramento Region is a 'hot spot' for the solar industry; it has great infrastructure and accessibility, very progressive utility providers, moderate business costs, and allows great access to state policy-makers."

Faried Muscati, Chief Executive Officer, Ecostream US, Inc.

Figure 12: Clean Energy Technology Company National Headquarters

Company	Operational Date
Ecostream US, Inc.	January 2007
Pacific Ethanol, Inc.	January 2007
Solar Power, Inc.	June 2006
SynapSense	May 2006
Bloo Solar	April 2006
SunTechnics Energy Systems, Inc.	October 2005
Jadoo Power	May 2003
Altery Systems	October 2001
Schott Solar, Inc.	June 2001

2) The headquarters for several research, promotion, and support organizations in the region include the California Fuel Cell Partnership, the Green Capital Alliance, and the Renewable Energy Institute International (REII). In addition, a number of venture capital firms heavily invest in the clean energy technology industries.

3) As the capital of California, the region is where many cutting-edge decisions are made, dramatically affecting the landscape of the industry. The region also hosts the headquarters of several key state agencies including Cal/EPA (Environmental Protection Agency), CalPERS (Public Employees' Retirement System), CalSTRS (State Teachers' Retirement System), California ARB (Air Resources Board), CEC (California Energy Commission), CalTrans (Department of Transportation), and the California ISO (Independent System Operators).



4) The Sacramento Region has 3 of the top 10 most progressive utility companies in the U.S. as community providers of natural gas and electricity: Pacific Gas and Electric Company (PG&E), the Sacramento Municipal Utility District (SMUD), and Roseville Electric. SMUD, a leader in the nation in alternative energy use, was recently ranked “Highest Customer Satisfaction with Business Electric Service in the Western U.S.” and scored highest in the nation by J.D. Power and Associates.

Recently Located Clean Energy Technology Companies

- » Ecostream US, Inc.
- » Enfinity
- » Frontier Wind
- » OptiSolar, Inc.
- » Pacific Ethanol, Inc.
- » SMA America

Statewide Clean Technology Initiatives Headquartered in Sacramento

- » California Biomass Collaborative
- » California Fuel Cell Partnership
- » California Lighting Technology Center
- » California Wind Energy Collaborative
- » Energy Efficiency Center

BIOTECHNOLOGY

The Sacramento Region is home to a fast-growing biotechnology community, with the world’s largest cluster of life science companies headquartered in the adjacent San Francisco Bay Area. Many consider the San Francisco Bay Area to be the birthplace of biotechnology, and it is currently home to several hundred biotechnology companies.

Although not the largest in the state, the Sacramento Region’s biotechnology and life sciences industries are growing rapidly. Today more than 100 biotechnology and medical device companies and 15,000 life sciences

employees call the Sacramento Region home.

With an abundant and highly qualified workforce from world-class institutions, available land and zoning in place, and collaborative efforts that will finance and develop new biomedical facilities, the Sacramento Region offers the greatest and most flexible opportunities for further expansion of the industry. Companies such as Lipomics in West Sacramento; Calgene LLC and Novozymes Biotech, Inc. in Davis; Volcano Therapeutics in Rancho Cordova; and Siemens in Woodland are representative of the region’s biotechnology sector. These companies are in manufacturing, research, or development of a wide variety of medical equipment, optical instruments, analytical devices, measuring and controlling devices, and biological, and other health-related products. Employees of life sciences companies generally earn higher than average wages.

UC Davis is one of the premier research universities in the world in life sciences, performing fundamental research in fields ranging from genetics and biology to agricultural and environmental sciences and from food and nutrition to veterinary and human medicine. It is the educational core of the life sciences sector in the region and has connections with most area biotech companies. The university has increasingly acted as a magnet for life sciences firms looking for the combination of proximity to all of the research institutions of Northern California with reasonable business costs and a high quality of life. This is a trend that is likely to continue and even increase in the near future as pharmaceutical and medical device companies turn ideas into products.

**UC Davis
is ranked 16th
in research
funding
among U.S.
universities
by the
National
Science
Foundation.**

Sacramento is the capital of the most progressive state in the nation on new and renewable energy.



The UC Davis Cancer Center has received National Cancer Institute status, making it one of only two Northern California health research institutions with this designation. In addition, UC Davis hosts the Center for Biophotonics Science and Technology, funded by a grant from the National Science Foundation to UC Davis, the Lawrence Livermore National Laboratory, and other partners. Biophotonics is the science of using light to understand the inner workings of cells and tissues in living organisms. The center collaborates with private and public research institutions for uses from healthcare to bio-defense. UC Davis serves as the lead educational institution in a 10-campus national effort in this science.

The biotechnology industry is a combination of science and technology, which holds great potential for growth and discovery in the future. This pioneering industry has broad social and economic reach — it is involved in, or developing products for, many areas including the improvement of human health, meeting energy and environmental needs, national defense, and new innovations. The industry includes a wide range of firms, many

of which are involved in pharmaceuticals and medical device research and development or manufacturing.

UC DAVIS AND UC DAVIS MEDICAL CENTER HIGHLIGHTS

- » One of the world's premier life sciences research institutions with biotechnology, medical, veterinary, and agricultural programs
- » Centers of Excellence that encourage collaborative public/private research and ties with private industry
- » Produces more Ph.D. biological scientists than any other university in the nation
- » On the cutting edge of new treatments and discoveries such as the nationally renowned, world-class research center for the study of autism, the M.I.N.D. Institute
- » \$573 million in research funding in 2006, currently ranking 16th among U.S. universities by the National Science Foundation (NSF)
- » Received \$6 million National Institutes of Health (NIH) funding for stem cell research, and is one of only two centers in the country funded by NIH to translate human stem cell research into therapies
- » NSF-funded Center for Biophotonics Science and Technology serves as the lead educational institution in a 10-campus national effort in this science
- » Ranked among the top medical schools in the nation for research and primary care according to *U.S. News & World Report's* "Best Graduate Schools in America" list
- » Inland California's only National Cancer Institute-designated Cancer Center
- » Research center studying how lasers and other light-based technologies can enhance medicine and pioneering the use of telemedicine technology
- » Home to the California National Primate Research Center, the only one of its kind in the UC system

Figure 13: Top Biotechnology Employers

Company	Employees
Affymetrix Inc.	201
Indexx Laboratories Inc.	180
Seminis Vegetable Seeds Inc.	175
Miltenyi Biotec Inc.	95
Novozymes Inc.	88
ALTA Analytical Laboratory	85
Monsanto, Calgene Campus	85
The Jackson Laboratory	70
Arcadia Biosciences, Davis Laboratory	45
MMI Genomics Inc.	36

Data Source: Sacramento Business Journal, Top 25 Book of Lists, December 2007

CALIFORNIA INSTITUTE FOR REGENERATIVE MEDICINE (CIRM)

With its recent grant award of \$20.1 million, UC Davis has been designated one of seven “CIRM Institutes” conducting research in all three of the specialized research categories of basic and discovery stem cell research — preclinical (translational) research, preclinical development, and clinical research. The award will, along with \$62 million in donor and institutional funding, initiate the construction of a major lab near the UC Davis Medical Center campus in Sacramento. In total, major Northern California campuses were awarded \$151 million of the total \$270 million facility round of funding.

HIGH TECHNOLOGY

Since the mid-1980s, the Sacramento Region’s economy has been largely influenced by technology. Nearly half of the largest 25 manufacturers in the region are involved in the research and development and production of high technology items. These companies include Intel Corporation, Hewlett-Packard, DST Output, Aerojet/Gencorp, NEC Electronics America, and Agilent Technologies.

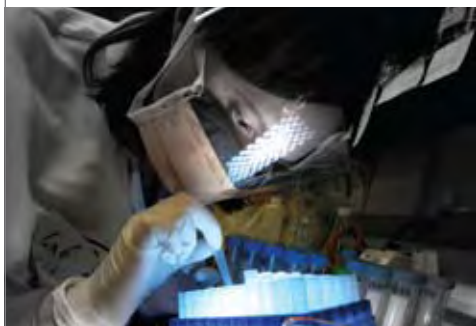


Figure 14: Top Software Development Companies

Company	Employees
FDI Collateral Management	475
ALLDATA Corp.	310
Pearson	185
Infor Public Sector	180
International Business Systems	135
Global Energy Decisions Inc.	109
Dorado Software Inc.	80
Meridian Systems Inc.	74
Synergex International Corp.	55
Unify Corp.	50

Data Source: Sacramento Business Journal, Top 25 Book of Lists, December 2007

Many of the largest technology companies made the move to the Sacramento Region during the 1980s and early 1990s. Since then, many have expanded their operations into campus facilities, oftentimes moving other divisions into the Sacramento Region. Hewlett-Packard and Intel Corporation both claim that their facilities in the Sacramento Region have the lowest employee turnover of any of their facilities.

GOLDEN CAPITAL NETWORK

Based in the northern valley of California, the Golden Capital Network is an organization designed to assist fledgling technology companies, investors, and entrepreneurs. The organization has been directly involved in launching new technology companies in the Sacramento Region, as well as attracting new venture capital to the area. Since 1999, the organization has coached and showcased more than 1,000 companies to 500 angel and venture capital investors at their company events. Presenting companies have raised more than \$1 billion in funding.

“BayBio is very bullish on the life sciences growth prospects for the Sacramento Region. With investments being made by UC Davis and rapid growth in company start-up activity, there is a lot to look forward to — this is only a beginning.” Matt Gardner, Executive Director, BayBio

regional infrastructure

With its relatively flat terrain, large fresh waterways flowing from the Sierra Nevada mountains, stable and mild weather, and very few geographic barriers that would prohibit development, the Sacramento Region offers a natural infrastructure that is conducive to growth. The original leaders of the region created a pathway to development that took into consideration the environment and agriculture, as well as the need for the regional infrastructure to stay ahead of both residential and commercial development. The region has been extremely successful in maintaining efficient transportation systems and a stable and cost-effective flow of resources necessary for business growth.

ELECTRICITY

The Sacramento Region provides efficient, cost-effective, and reliable energy to its residents and businesses in the six-county area. The region's three major electric utility providers—Pacific Gas and Electric Company (PG&E), Roseville Electric, and Sacramento Municipal Utility District (SMUD)—are on the cutting edge of clean energy development and implementation. Nationally recognized programs in hydro, solar, photovoltaic, wind, and natural resources energy development are offered by all three utilities and are helping to set the tone for the region.

Pacific Gas and Electric Company (PG&E)

PG&E is a publicly owned corporation delivering safe, reliable, and responsive gas, electric, and customer service to a population of approximately 15 million people throughout Northern and Central California. In the Sacramento Region, PG&E supplies electricity to Yolo, Sutter, Yuba, El Dorado, and Placer Counties—excluding the City of Roseville and natural gas to the entire region.

PG&E is committed to being an environmental leader and demonstrates this through its actions. PG&E's pledge is to think creatively, work cooperatively in the Sacramento Region, and be results-oriented in environmental stewardship efforts. In 2008, the company was recognized by the Planning and Conservation League (PCL) as the "Environmental Business of the Year." The award recognizes PG&E's leadership in renewable energy and land

stewardship. On average, more than half of the electricity delivered to customers comes from sources emitting no carbon dioxide, a greenhouse gas. PG&E spearheaded \$1 billion in enhanced energy efficiency programs for its customers from 2006 to 2008 — the largest effort of its kind by a U.S. utility company, and plans for more in 2009 to 2011. PG&E has committed to making its buildings climate neutral and has connected over 21,000 solar customers.

Roseville Electric

Roseville Electric, the City of Roseville's award-winning electric utility since 1912, provides its 50,000 customers reliable energy and dependable service at some of the lowest energy rates in California.

Roseville Electric owns and operates a 160-megawatt power plant that produces enough electricity to meet up to 40 percent of its customers' energy needs. The natural gas-fired combined cycle plant uses 1.4 million gallons of recycled water in its energy generation and cooling processes.

The city-owned utility also strives to achieve a sustainable energy future by investing in clean, renewable energy projects and energy efficiency through innovative programs including their clean energy program, Green Roseville, and their award-winning BEST Homes program, which integrates rooftop solar and high-efficiency measures into new home construction.





The Sacramento Region's three major electric utility providers—Pacific Gas and Electric Company (PG&E), Sacramento Municipal Utility District (SMUD), and Roseville Electric—are on the cutting edge of clean energy development and implementation.

Sacramento Municipal Utility District (SMUD)

SMUD is Northern California's largest customer-owned electric utility. It has earned a reputation as an innovative, customer-focused utility with a superior power reliability record. SMUD offers a stable transmission and distribution network and a diverse mix of power sources, including an extensive hydroelectric system. SMUD's rates are roughly 25 percent less than California's investor-owned utilities. SMUD offers a wide range of rate alternatives, including attractive economic development rate discounts for new and expanding companies, a Greenergy® rate, and customer-tailored rates. SMUD is a nationally recognized leader in renewable resources and electric transportation and offers natural sources of energy such as the sun, the wind, or methane gas through SMUD's Greenergy® program. The utility company recently completed construction of the Cosumnes Power Plant. This highly efficient natural gas-fired plant produces enough power to serve 450,000 households. In addition, SMUD has a staff of experienced engineers, architects, energy specialists, and technicians who can work with a business to design energy efficiency and optimal energy use into its facility and processes.

WATER

There are many water and wastewater service providers in the Sacramento Region—most are operated at the city or county level, and a couple are operated through investor or publicly owned utilities. In Sacramento County alone, over 30 public and private entities supply water services. These companies are organized as water maintenance districts, municipal water districts, irrigation districts,

mutual water companies, and commercial water companies.

The Sacramento Region enjoys an abundant water supply. Commercial water rates are among the lowest in the state. These low rates are a result of the area's proximity to major rivers and the ability to tap vast underground resources in the Sacramento Valley.

GROUND STABILITY

The Sacramento Region is noted for its geological stability. Unlike the San Francisco Bay and Los Angeles areas, which have high levels of seismic activity, the Sacramento Region ranks among the lowest in the state for the probability of a major earthquake. Due to their delicate computer operations, geological stability was an important relocation factor for firms in the region such as Intel Corporation, Hewlett-Packard, Apple Computer, Packard Bell, and NEC Electronics America, and other major corporations with "mission critical" information and data storage systems.

TRANSPORTATION

Very few metropolitan areas benefit from a transportation network as developed and accessible as that in the Sacramento Region. Interstate freeways, transcontinental railways, a deep-water shipping channel, and an international airport provide convenient access to many major markets. Four major freeways allow one-day freight delivery throughout California and easy access to key markets in the Western United States. This makes the Sacramento Region a major hub for logistics and distribution facilities. Similarly, the Port of Sacramento provides deep-draft ship



access for both manufactured and agricultural products. Overall, Sacramento's

links to major markets throughout the globe are extensive, creating a competitive advantage for businesses in the region. Very few metropolitan areas in the nation can claim to have an international airport, major rail hub, deep-water shipping channel, and junction of three transnational freeways within ten miles of the downtown area.

HIGHWAYS

The intersection of several major highways makes the Sacramento Region an excellent center for freight distribution. Interstate 5 provides a direct route to Seattle, Portland, and Los Angeles. Interstate 80 permits one-day travel to Salt Lake City, and the San Francisco Bay Area and Reno are just two hours away. Lake Tahoe and Nevada are reachable within two hours on both Interstate 80 and Highway 50. Highway 99 provides quick access to the San Joaquin and upper Sacramento Valleys.

AIRPORTS

Sacramento International, Mather, and Sacramento Executive Airports are all operated by the Sacramento County Airport System.

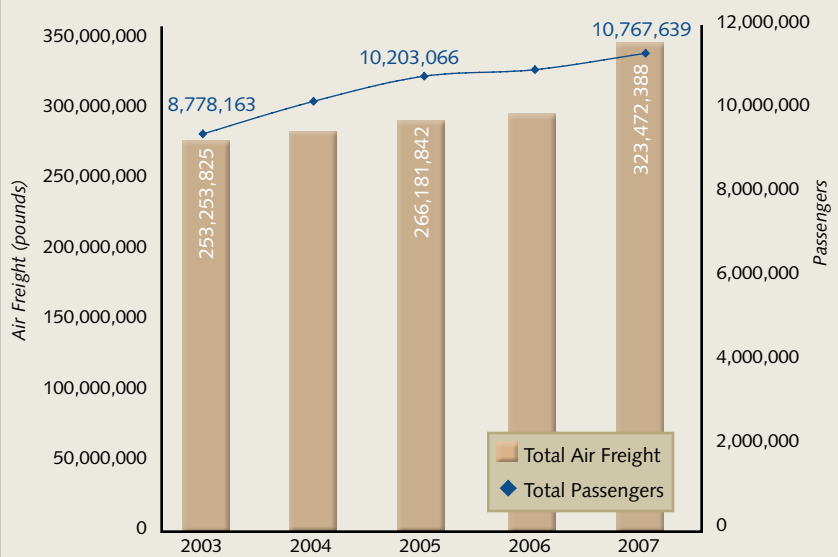
Sacramento International is a commercial passenger air carrier facility offering either non-stop or connecting service to every major city in the United States. The airport occupies approximately 6,000 acres of land, including a buffer zone of agricultural land, allowing for expansion without encroachment problems or incompatible land use. Two 8,600-foot precision instrument runways serve the airport, providing capacity for over 400,000 annual operations. At present, Sacramento International Airport has begun The Big Build: construction of a new Central Terminal and an airside concourse. The project is the largest capital improvement project by the County of Sacramento and will replace aging facilities that first opened in 1967.



Mather Airport is a thriving air cargo and general aviation center with one of the longest runways — 11,300 feet — in California. Mather also hosts the California Capital Airshow, a regional aviation event.

Executive Airport is one of the finest general aviation airports in Northern California. Originally the site of commercial passenger service prior to completion of Sacramento International, Executive Airport is conveniently located just minutes from downtown Sacramento.

Figure 15: Total Air Freight and Passengers



Sacramento Regional Research Institute, August 2008
Data Source: California Department of Airports, Passenger and Operations Reports

PORT OF SACRAMENTO

Located in West Sacramento, less than two miles from downtown Sacramento and one mile from the connection of Interstate 5, Interstate 80, and Highway 50, the Port of Sacramento provides deep-water channel access to the Delta region, San Francisco Bay, and the Pacific Ocean. The Port is also connected to major railways, operating on the Port's own track system and 200-car marshalling system. A variety of bulk and break bulk cargo move through the Port's five berths. The major commodities supported by the Port are wheat, wood chips, fertilizers, lumber, newsprint, sand, clay, fiberboard, and steel. It also supports one of the largest rice-growing regions in the world — the Northern Sacramento Valley. Located 79 nautical miles northeast of the San Francisco Bay, the inland Port of Sacramento provides environmental protection, enabling it to handle many sensitive cargos. Ship loaders, warehouses, and enclosed conveyor systems are equipped with dust collection equipment.

PUBLIC TRANSIT

Public transportation systems in the region include Sacramento Regional Transit (RT), Tahoe Area Regional Transit (TART), Yuba Sutter Transit, YOLOBUS, Roseville Transit, and the City of Elk Grove's e-tran. All systems provide convenient and efficient bus service, and RT's light rail service extends 36.87 miles covering a 418 square-mile service area. As light rail ridership increases, RT continues to extend the rail system. In addition, the



Figure 16: 20 Year Vision Map

Capitol Corridor Amtrak trains provide 170 miles of fast, reliable and affordable intercity rail service to 16 stations in eight Northern California counties: Placer, Sacramento, Yolo, Solano, Contra Costa, Alameda, San Francisco, and Santa Clara. An extensive, dedicated motorcoach network provides bus connections to serve the second-largest urban service area in the Western United States.

The City of Sacramento has embarked on a venture to design and develop the Sacramento Intermodal Transportation Facility (SITF) project. The facility will be a state-of-the-art transportation center that provides user-friendly connections between various modes of transportation, where bicycle, pedestrian, bus, light rail, taxi, and train connections can be planned. The new facility may also include airline ticketing, rental car services, charter operations, and other travel amenities and services.



The Sacramento Region's central location and transportation assets allow optimal accessibility to all major markets in the Western United States.

quality of life

The Sacramento Region appeals to diverse lifestyles and interests and offers a superior quality of life. A wide spectrum of recreational activities is readily available to all who reside in and visit the area. With an agreeable climate where weather inspires regular outdoor activity, the Sacramento Region offers year-round entertainment for sports and outdoor enthusiasts. In addition, the region's culturally rich metropolitan areas offer a broad array of arts and entertainment offerings to satisfy the varied interests of the region's residents.

REGIONAL LANDSCAPE

Scenery in the Sacramento Region is as diverse as it is spectacular. The San Joaquin Delta, agricultural fields, foothills, gold country, lakes and rivers, national parks, and Sierra Nevada Mountains all contribute to the natural beauty of the Sacramento Region. The juxtaposition of the skyline of metropolitan downtown with the tree-lined restaurant, retail, and residential charm of midtown creates a beauty all its own.

WEATHER

The region's Mediterranean-like climate is characterized by temperate weather conditions and low humidity. Summer days in the area are sunny and warm, and delta breezes help keep summer nights cool and invigorating. Winters are mild, with temperatures typically ranging from 43 to

58 degrees. The moderate rainy season, which occurs between November and March, produced 18 inches of rain in 2007.

HISTORIC MUSEUMS AND LANDMARKS

The rich history of the Sacramento Region can be experienced through its various museums and attractions. The area provided the backdrop for the Gold Rush, Pony Express, and the western terminus of the first Transcontinental Railroad, and it continues to play an important role in state and national politics.

Some of the more prominent regional historic attractions include:

- » Aerospace Museum of California
- » B.F. Hastings Building
- » California Foundry History Museum



Figure 17: Sacramento Climate

Month	Temperature (F) Average	Maximum	Minimum	Total Inches of Precipitation
January	45.5	53	38	4
February	50.5	60	41	3
March	53.5	64	43	3
April	58.5	71	46	1
May	65	80	50	0
June	71.5	88	55	0
July	75.5	93	58	0
August	75	92	58	0
September	71.5	87	56	0
October	64	78	50	1
November	53	63	43	3
December	45.5	53	38	3
Annual	60.8	73.5	48	18



Sacramento is one of the sunniest places in the U.S. with an average of 189 clear days per year.

- » California Museum for History, Women & the Arts
- » California State Capitol Museum
- » California State Indian Museum
- » California State Military Museum
- » California State Railroad Museum
- » Central Pacific Passenger Station
- » Crocker Art Museum
- » Discovery Museum
- » Eagle Theater
- » Folsom Historic District
- » Folsom History Museum
- » Governor's Mansion State Historic Park
- » Historic Old Towne Auburn
- » Historic Sutter Street, Folsom
- » Leland Stanford Mansion State Historic Park
- » Locke Historic District
- » Old Sacramento Schoolhouse Museum
- » Old Sacramento State Historic Park
- » Sacramento Historic City Cemetery
- » Sutter's Fort State Historic Park
- » Towe Auto Museum
- » Wells Fargo History Museums

Featured Attractions

The famous Crocker Art Museum, founded in 1885, is the oldest continuous art museum in the west. A Victorian mansion with a contemporary wing, the Crocker's permanent collection includes early California paintings, old master's drawings, European art, international ceramics, and contemporary Northern California art. The museum also hosts renowned national and international traveling exhibits each year. The Crocker is undergoing an expansion that will triple its size and vastly improve the visitor experience and collection care.

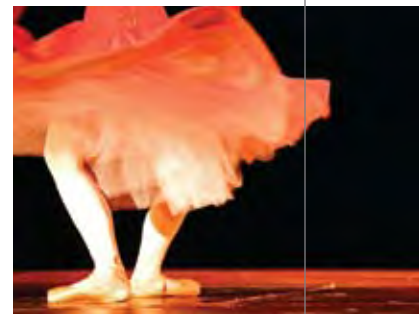
The California State Railroad Museum is widely regarded as the most popular railroad museum in the country. It features restored

trains, engaging exhibits, unique special events, and steam locomotive rides.

Governor Arnold Schwarzenegger and First Lady Maria Shriver serve as Honorary Chairs for the California Museum for History, Women & the Arts. The museum's vast archives and collections tell the story of the men and women who shaped the history of California.

The California State Capitol Museum features impressive architecture, portraits of governors, murals, exhibits, historic rooms and working offices, and a chance to see state senators and representatives conduct business.

Old Sacramento, a 28-acre Gold Rush era district, attracts over 5 million visitors every year. Original restored structures house over 200 restaurants and shops. Visitors can stroll the wooden sidewalks, enjoy a horse-drawn carriage ride on the cobble stone streets, or take a scenic walk along the banks of the Sacramento River.



PERFORMING ARTS

Sacramento is home to professional ballet, opera, and theater companies. Numerous small playhouses, theaters, colleges, and universities also stage a variety of performances during the year.

Featured Performing Arts

The Sacramento Ballet is the professional resident ballet company for the Sacramento Region. Its talented dancers and artistic directors produce works of incredible artistic integrity and broad public appeal.

The Sacramento Opera produces outstanding works to develop and cultivate a wider public interest in opera and its allied arts. In addition to classics and masterpieces from the standard operatic repertoire, the company has commissioned and mounted two world premieres.



Opened in 2002, the 1,800-seat Robert and Margrit Mondavi Center for the Performing Arts on the University of California, Davis campus is one of the premier performing arts centers on the West Coast. It touts a state-of-the art acoustic design and features world-class international entertainment.

The California Musical Theatre, producer of the Music Circus and Broadway Sacramento Series, sells over 200,000 tickets each year for its combination of summer stock in-the-round musical theater and touring companies of recent Broadway hits.

The Sacramento Region's resident professional theater group, the Sacramento Theatre Company, offers the ultimate theater experience, presenting contemporary and traditional works in an intimate setting.

Recognized as one of Northern California's top professional theaters, the B Street Theatre has been bringing innovative productions of new plays to the region since 1991. More than 90 new plays have been presented, 60 of which were world, American, West Coast, or regional premieres.

The Sacramento Philharmonic Orchestra is the professional symphonic orchestra for the Sacramento Region. The orchestra contracts the services of 83 professional musicians and partners with the Sacramento Opera, the Sacramento Ballet, and other arts groups in the region.

Some of the local performing arts groups and entertainment venues include:

- » ARCO Arena
- » B Street Theatre
- » Broadway Playhouse
- » Cal Expo
- » California Musical Theatre

- » California State University, Sacramento Department of Theatre
- » Camellia Symphony Orchestra
- » Capital Jazz Project
- » Capital Stage Company
- » Capitol Ballet Company
- » Capitol Opera Sacramento
- » Chamber Music Alive!
- » Chamber Music Society of Sacramento
- » Chautauqua Playhouse
- » City Theatre at Sacramento City College
- » Davis Musical Theatre Company
- » Eagle Theater
- » El Dorado Musical Theatre
- » Gold Country Chamber Orchestra
- » Light Opera Theater of Sacramento
- » Memorial Auditorium
- » Mondavi Center
- » Sacramento Ballet
- » Sacramento Capitolaire
- » Sacramento Choral Society & Orchestra
- » Sacramento Community Center Theater
- » Sacramento Convention Center
- » Sacramento Gay Men's Chorus
- » Sacramento Master Singers
- » Sacramento Opera
- » Sacramento Philharmonic Orchestra
- » Sacramento Poetry Center
- » Sacramento Theatre Company
- » Sleep Train Amphitheatre
- » The Studio Theater
- » UC Davis Department of Theatre & Dance
- » Woodland Opera House

VISUAL ARTS

Dozens of art galleries in the downtown Sacramento area feature both local and international works of art, and appeal to art



Downtown Sacramento = 66 Blocks + 121 Restaurants + 165 Shops

experts and novices alike. On the second Saturday of each month, over 100 galleries and venues in the area remain open late into the evening, many offering free admission, beverages and hors d'oeuvres, and live music.

SHOPPING AND DINING

Shopping in the region is a popular diversion for residents and visitors alike. Several large malls and plazas with major national retailers serve the region including Westfield Downtown Plaza, Arden Fair Mall, and Westfield Roseville Galleria. Area boutiques are great for specialty items or just browsing.

Residents have a virtually endless variety of dining options, as the Sacramento Region is increasingly known for its international foods and gourmet restaurants. The region's dining options will satisfy any appetite, with everything from bistros and cafes to upscale restaurants featuring nationally renowned chefs.

ANNUAL EVENTS

The biggest attraction for jazz fans is the Sacramento Jazz Jubilee, the world's largest traditional jazz festival. The event is presented by the Sacramento Traditional Jazz Society and has been held every Memorial Day weekend since 1974. Over 100 bands from all over the country and all over the stylistic map perform for approximately 100,000 attendees and bring in \$30 million annually to the local economy.

Each year the California State Fair brings in more than 900,000 visitors to enjoy its competitions, vendors, live entertainment, local exhibits, and the Magnificent Midway.

Local theaters host numerous film festivals throughout the year, including the Sacramento Jewish Film Festival, Sacramento International Film Festival, French Film Festival, Black Film Festival, and Sacramento International Gay and Lesbian Film Festival.

The annual Gold Rush Days transforms Old Sacramento into a scene from the 1850s during this four-day event. Re-enactors roam the old town and cars are banned for this event that features storytelling, period musicians and entertainment, wagon rides, pony rides, and gold panning.

Other local festivals showcase the cultural diversity of the area with events such as the Croatian Extravaganza, Festa Italiana, Festival de la Familia, Greek Food Festival, Hmong Celebration, Pacific Rim Street Fest, and Scottish Games & Festival.

SPORTS AND OUTDOOR ACTIVITIES

Sports thrive in the Sacramento Region, due in large part to the climate and local support. The people of Sacramento are proud to have several professional sports teams and an assortment of college teams.

Sacramento is home to the NBA Kings and the WNBA Monarchs. The Sacramento River Cats play minor league baseball at Raley Field, a beautiful \$30 million stadium.

Sacramento is a host city to the AMGEN Tour of California, the largest cycling event in America. This Tour-de-France-style 800-mile race attracts top riders from around the world and will include Lance Armstrong in 2009.

One of only 11 teams in the country, the Sacramento Capitals have been a member of the World TeamTennis League for 20 years and have brought international tennis stars to Sacramento.

Sacramento has hosted the California International Marathon (CIM) for 25 years. The scenic course begins at the Folsom Dam and finishes in front of the spectacular California State Capitol. The field of 9,000+ runners includes recreational runners as well as elite athletes from around the world.

The Sacramento Region's uniquely diverse population is a melting pot of various ages, heritages, and lifestyles that come together to create a remarkable community.



The city of Davis is often called the “Bicycle Capital of the U.S.” and is the only city to receive the Platinum award by the Bicycle Friendly Communities Campaign and the League of American Bicyclists.

— Source: www.bicyclefriendlycommunity.org



Residents of the region take advantage of the beautiful and varied weather conditions to take up some sports pastimes of their own. During warmer months residents enjoy parks with sports fields and courts as well as golf courses and swimming pools. Lakes and rivers are popular places to stay cool in the summer and are perfect for fishing, boating, and other water sports. The beautiful Sierra Nevada Mountains are a prime destination for hiking, mountain biking, and camping.

Snow skiing and snowboarding are popular winter pastimes of the region's residents. World-class ski resorts in the Sierra Nevada Mountain Range are within a two-hour drive of downtown Sacramento. These include Squaw Valley, Northstar-at-Tahoe, Sugar Bowl, Boreal, Alpine Meadows, and Heavenly. Residents can also opt to stay in the area and enjoy the seasonal Downtown Plaza Ice Rink.

PARKS AND NATURE

The Sacramento-San Joaquin Delta, the Sacramento Zoological Gardens and the various botanical gardens and arboretums in the Sacramento Region are of interest to naturalists and provide rare access to isolated ecosystems.

The Sacramento Zoo is home to more than 600 animals, including exotic and endangered species, and is rated as one of the best small zoos in the country.

Capitol Park covers over 33 of the 40-acre site of the State Capitol and is a peaceful retreat within the busy city. It is home to the World Peace Rose Garden and a number of memorials. The shady park is occupied by hundreds of varieties of trees, plants, and flowers, and is perfect for a quiet stroll or picnic.



Outdoor activity also thrives within the American River Parkway, which offers 5,000 acres of recreation area. The Jedediah Smith Memorial Bike Trail provides over 32 miles of nature, animals, and river access. Extending from Folsom to downtown Sacramento, it is the longest city bike trail in the country and was named best road biking trail in America by Trails.com.

With over 14,000 acres of fabulous recreation habitat, Sacramento County's parks and open spaces offer a wide range of activities including cycling, rafting, kayaking, windsurfing, horseback riding, running, and much more.

OTHER ATTRACTIONS

Friday Night Concerts in the Park are held at Caesar Chavez Park and feature local bands and musicians. Residents and visitors also support the local music scene at Third Thursday Jazz concerts at the Crocker Art Museum. Concerts in the park are offered throughout the summer months at the many community parks around the region.

The fall apple harvest can be experienced at the Apple Hill ranches located just 50 miles from downtown Sacramento. Many of the 50 ranches feature scenic vistas, and the area's fall foliage provides the perfect backdrop for a day of old-fashioned family fun.

The nearby wine regions offer some of the country's finest wineries and vineyards. Visitors can pack a picnic lunch, taste some great wines, and enjoy the gorgeous scenery.

Cities in the area feature year-round farmers' markets where local farmers and vendors sell fresh, organic produce and goods.

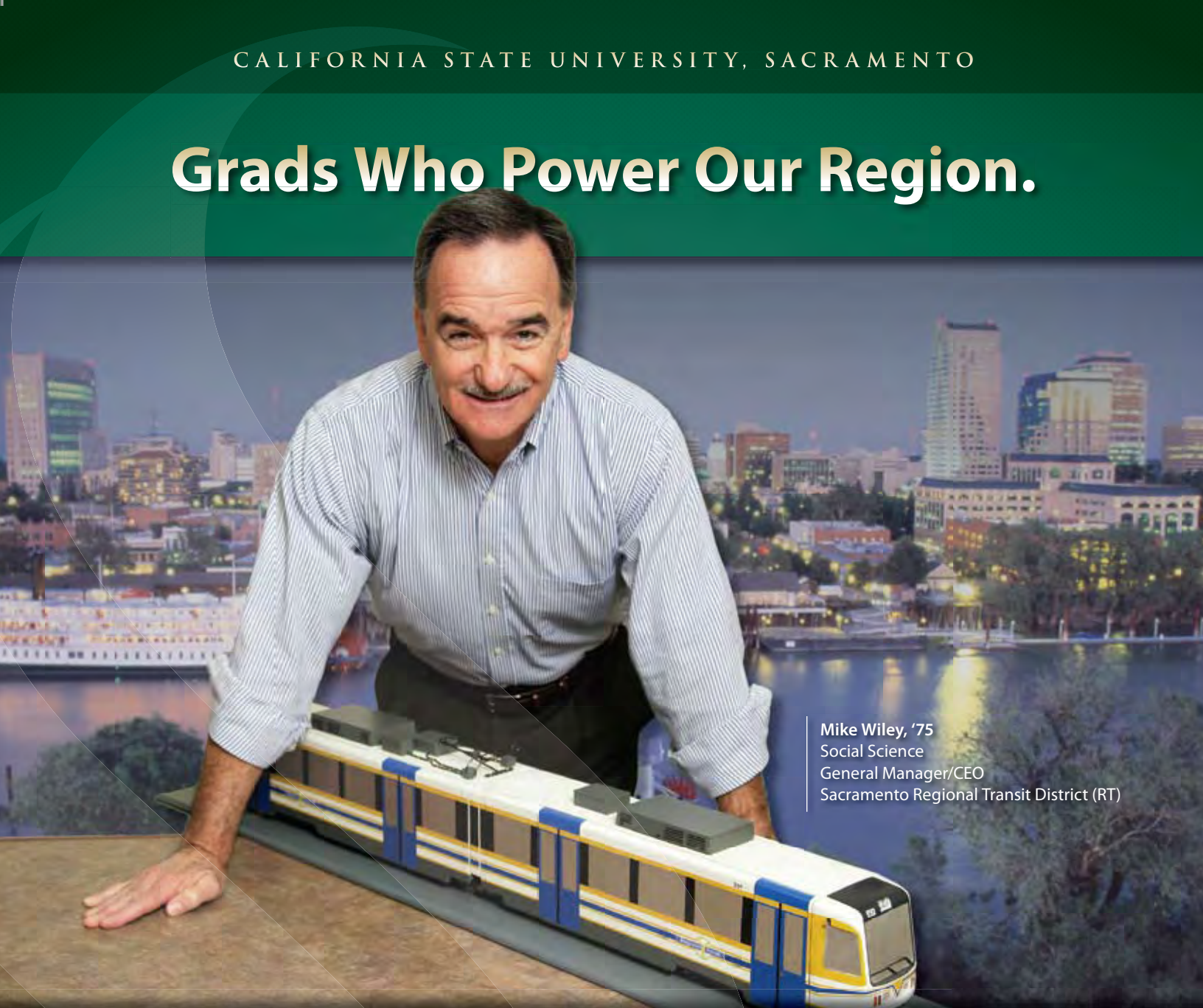
EVENT AND CONFERENCE VENUES

Hotels and conference centers in the area offer meeting and conference facilities that accommodate small group seminars as well as large-scale conventions and trade shows.

The downtown Sacramento Convention Center underwent an \$80 million expansion in 1996 that tripled its size. The 385,000 square foot facility features 31 meeting rooms, a 24,500 square foot ballroom, \$1 million in public art, and boasts elegant pre-function areas and a rooftop garden terrace. The Memorial Auditorium, another premier venue, opened in 1927 and reopened in 1996 after extensive renovation. The auditorium is a 3,800-seat multi-use arena and performing arts venue.



Grads Who Power Our Region.



Mike Wiley, '75
Social Science
General Manager/CEO
Sacramento Regional Transit District (RT)

Look around and you'll find them—protecting our safety, teaching our children, leading our communities, building our bridges. Nurses, engineers, artists, judges, journalists, entrepreneurs. They are Sacramento State alumni—more than 190,000 strong—and they're making a difference throughout our region.

For more information on program offerings, visit www.csus.edu



SACRAMENTO STATE
Leadership begins here.

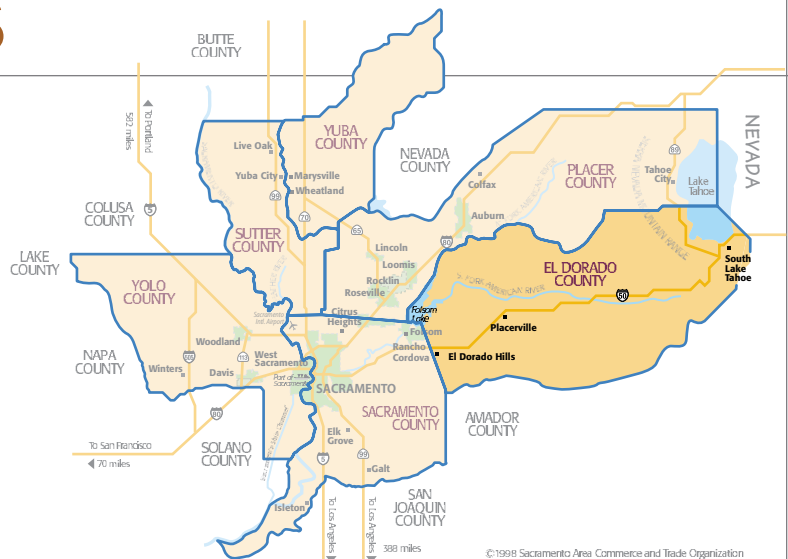
countyprofiles



county profiles

El Dorado County

El Dorado County includes the incorporated cities of Placerville and South Lake Tahoe.



	ABSOLUTE CHANGE				% CHANGE	
	1998	2008	2018	1998-2008	2008-2018	1998-2008
Population	150,857	179,722	199,947	28,865	20,225	19.1%

Data Source: California Department of Finance, E-5 Population and Housing Estimates, and 2007 Long-Term Socio-Economic Forecasts by County.

Notes: Current/historical figures represent January 1 estimates for the year specified.

	ABSOLUTE CHANGE				% CHANGE	
	1998	2003	2008	2003-2008	1998-2008	2003-2008
Housing Units	69,399	75,336	83,275	7,939	13,876	10.5%

Data Source: California Department of Finance, E-5 Population and Housing Estimates.

Notes: Data represent January 1 estimates for the year specified. Differences due to rounding.

	ABSOLUTE CHANGE				% CHANGE	
	1997	2002	2007	2002-2007	1997-2007	2002-2007
Employment	35,800	47,400	*			

Data Source: California Employment Development Department, Annual Average Employment by Industry Data.

Note: Differences due to rounding. * Data not yet available for 2007.

2006 per Capita Income	\$44,657
2007 Median Home Price	\$450,000

Data Sources: Bureau of Economic Analysis, California Association of Realtors*, DataQuick Information Systems

MAJOR NON-GOVERNMENT EMPLOYERS	# OF EMPLOYEES
Blue Shield of California	1,385
DST Output	1,200
Marshall Medical Center	1,017
Raley's Inc.	712
Sierra-at-Tahoe Inc.*	635
Roebbelen Contracting, Inc.	375
Doug Veerkamp General Engineering, Inc.	279
Embassy Suites Lake Tahoe Resorts	240
El Dorado Savings Bank	179
Sierra Pacific Industries	165

Data Source: Sacramento Business Journal Top 25 Book of Lists 2007

Notes: Employment numbers are full-time equivalents except where otherwise noted.

* 635 peak; 500 seasonal; 23 year round

MEAN COMMUTE TIME (2006)	AVERAGE MINUTES
County	26.6
State	26.8

Data Source: US Census Bureau, American Community Survey 2006.

Note: Data represent that of workers aged 16+.

PUBLIC EDUCATION	2007-2008 ENROLLMENT
K-12	29,666

Data Source: California Department of Education, DataQuest.

2006-2007 AVERAGE SAT SCORES	TOTAL
County	1,601
State	1,497

Data Source: California Department of Education, DataQuest

PUBLIC SCHOOL DISTRICTS INCLUDED
Black Oak Mine Unified, Buckeye Union Elementary, Camino Union Elementary, El Dorado Union High, Gold Oak Union Elementary, Gold Trail Union Elementary, Indian Diggings Elementary, Lake Tahoe Unified, Latrobe, Mother Lode Union Elementary, Pioneer Union Elementary, Placerville Union Elementary, Pollock Pines Elementary, Rescue Union Elementary, Silver Fork Elementary

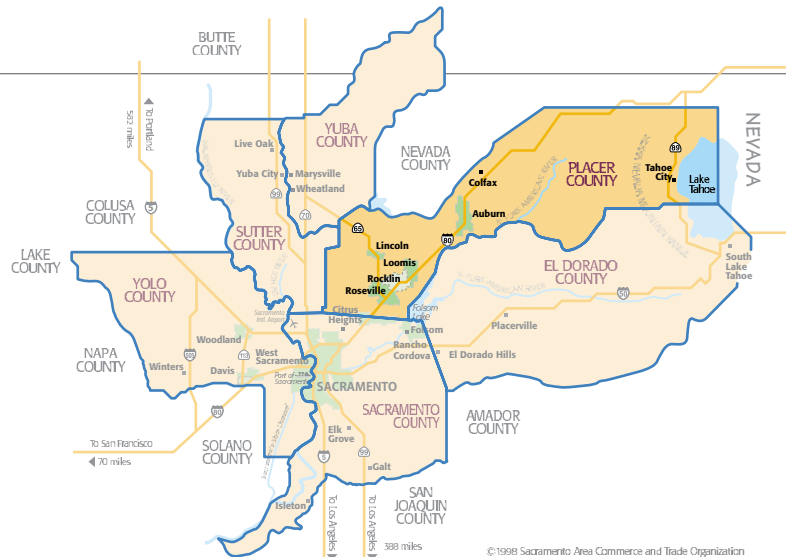
Data Source: California Department of Education, DataQuest.

COLLEGES AND UNIVERSITIES
Lake Tahoe Community College

Data Source: California Postsecondary Education Commission

Placer County

Placer County includes the incorporated cities of Auburn, Colfax, Lincoln, Loomis, Rocklin, and Roseville.



©1998 Sacramento Area Commerce and Trade Organization

	ABSOLUTE CHANGE				% CHANGE	
	1998	2008	2018	1998-2008	2008-2018	
Population	229,686	333,401	423,998	103,715	90,597	45.2% 27.2%

Data Source: California Department of Finance, E-5 Population and Housing Estimates, and 2007 Long-Term Socio-Economic Forecasts by County.

Notes: Current/historical figures represent January 1 estimates for the year specified.

	ABSOLUTE CHANGE				% CHANGE	
	1998	2003	2008	2003-2008	1998-2008	
Housing Units	97,089	122,954	147,408	24,454	50,319	19.9% 51.8%

Data Source: California Department of Finance, E-5 Population and Housing Estimates.

Notes: Data represent January 1 estimates for the year specified. Differences due to rounding.

	ABSOLUTE CHANGE				% CHANGE	
	1997	2002	2007	2002-2007	1997-2007	
Employment	88,700	120,700	*			

Data Source: California Employment Development Department, Annual Average Employment by Industry Data.

Note: Differences due to rounding. * Data not yet available for 2007.

2006 per Capita Income	\$43,937
2007 Median Home Price	\$420,000

Data Sources: Bureau of Economic Analysis, California Association of Realtors®, DataQuick Information Systems

MAJOR NON-GOVERNMENT EMPLOYERS	# OF EMPLOYEES
Hewlett-Packard Company	3,800
Sutter Health	2,605
Kaiser Permanente	2,418
PRIDE Industries Inc.	1,429
Union Pacific Railroad Co. Inc.	1,324
Raley's Inc.	1,195
NEC Electronics America Inc.	880
Pacific Gas and Electric Co.	703
Wells Fargo & Co.	632
Target Corp.	587

Data Source: Sacramento Business Journal Top 25 Book of Lists 2007

Note: Employment numbers are full-time equivalents except where otherwise noted.

MEAN COMMUTE TIME (2006)	AVERAGE MINUTES
County	25.9
State	26.8

Data Source: US Census Bureau, American Community Survey 2006.

Note: Data represent that of workers aged 16+.

PUBLIC EDUCATION	2007-2008 ENROLLMENT
K-12	65,540

Data Source: California Department of Education, DataQuest.

2006-2007 AVERAGE SAT SCORES	TOTAL
County	1,576
State	1,497

Data Source: California Department of Education, DataQuest.

PUBLIC SCHOOL DISTRICTS INCLUDED
Ackerman Elementary, Alta-Dutch Flat Union Elementary, Auburn Union Elementary, Colfax Elementary, Dry Creek Joint Elementary, Eureka Union, Foresthill Union Elementary, Loomis Union Elementary, Newcastle Elementary, Ophir Elementary, Placer Hills Union Elementary, Placer Union High, Rocklin Unified, Roseville City Elementary, Roseville Joint Union High, Tahoe-Truckee Joint Unified, Western Placer Unified

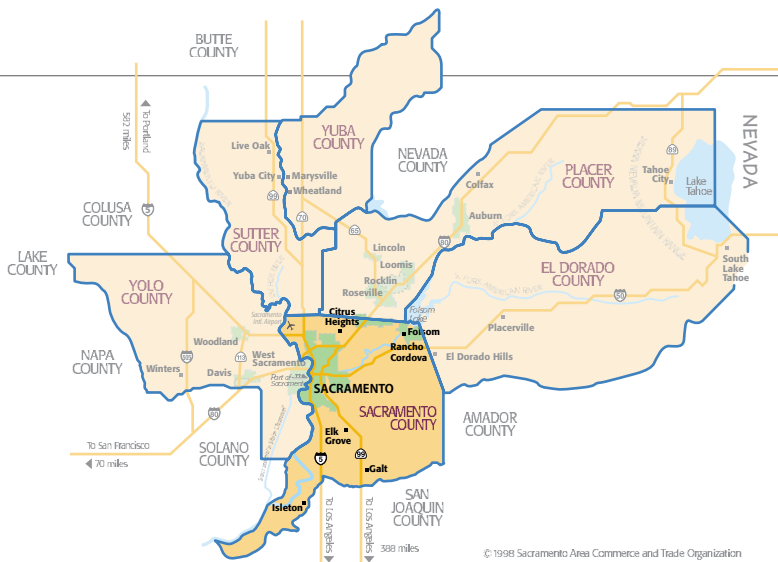
Data Source: California Department of Education, DataQuest.

COLLEGES AND UNIVERSITIES
Sierra College; Chapman University; William Jessup University; Heald College; Aviation & Electronic School of America; University of Phoenix; Weimar College

Data Source: California Postsecondary Education Commission

Sacramento County

Sacramento County includes the incorporated cities of Citrus Heights, Elk Grove, Folsom, Galt, Isleton, Rancho Cordova, and Sacramento.



	ABSOLUTE CHANGE				% CHANGE	
	1998	2008	2018	1998-2008	2008-2018	
Population	1,157,440	1,424,415	1,669,657	266,975	245,242	23.1% 17.2%

Data Source: California Department of Finance, E-5 Population and Housing Estimates, and 2007 Long-Term Socio-Economic Forecasts by County.
Notes: Current/historical figures represent January 1 estimates for the year specified.

	ABSOLUTE CHANGE				% CHANGE	
	1998	2003	2008	2003-2008	1998-2008	
Housing Units	462,130	502,159	551,219	49,060	89,089	9.8% 19.3%

Data Source: California Department of Finance, E-5 Population and Housing Estimates.
Notes: Data represent January 1 estimates for the year specified. Differences due to rounding.

	ABSOLUTE CHANGE				% CHANGE	
	1997	2002	2007	2002-2007	1997-2007	
Employment	504,600	578,800	*			

Data Source: California Employment Development Department, Annual Average Employment by Industry Data.
Note: Differences due to rounding. * Data not yet available for 2007.

2006 per Capita Income	\$35,197
2007 Median Home Price	\$325,000

Data Sources: Bureau of Economic Analysis, California Association of Realtors®, DataQuick Information Systems

MAJOR NON-GOVERNMENT EMPLOYERS	# OF EMPLOYEES
UC Davis Health System	7,901
Sutter Health Sacramento Sierra Region	7,140
Kaiser Permanente	6,905
Intel Corp.	6,800
AT&T California	4,765
CHW/Mercy Sacramento	4,698
Health Net of California, Health Net Federal Services	2,620
Wells Fargo & Co.	2,536
Sacramento Municipal Utility District	1,944
Target	1,897

Data Source: Sacramento Business Journal Top 25 Book of Lists 2007.
Note: Employment numbers are full-time equivalents except where otherwise noted.

MEAN COMMUTE TIME (2006)	AVERAGE MINUTES
County	25.7
State	26.8

Data Source: US Census Bureau, American Community Survey 2006.
Note: Data represent that of workers aged 16+.

PUBLIC EDUCATION	2007-2008 ENROLLMENT
K-12	238,627

Data Source: California Department of Education, DataQuest.

2006-2007 AVERAGE SAT SCORES	TOTAL
County	1,475
State	1,497

Data Source: California Department of Education, DataQuest.

PUBLIC SCHOOL DISTRICTS INCLUDED
Arcohe Union Elementary, Center Joint Unified, Elk Grove Unified, Elverta Joint Elementary, Folsom-Cordova Unified, Galt Joint Union Elementary, Galt Joint Union High, Natomas Unified, River Delta Joint Unified, Robla Elementary, Sacramento City Unified, San Juan Unified, Twin Rivers Unified

Data Source: California Department of Education, DataQuest.

COLLEGES AND UNIVERSITIES
University of California, Davis; California State University, Sacramento; American River College; Cosumnes River College; Folsom Lake College; Sacramento City College; Chapman University; Fuller Theological Seminary; Golden Gate University; National University; Patten University; Saint Mary's College of California; University of San Francisco; University of Southern California; McGeorge School of Law - University of the Pacific; Breining Institute; Bryan College; Western Career College; California College of Technology; Capital Bible College; DeVry University; Heald College; High-Tech Institute; ITT Technical Institute; Lincoln Law School of Sacramento; MTI College of Business and Technology; Northwestern California University School of Law; Professional School of Psychology Sacramento; Rudolf Steiner College; Trinity Life Bible College; The Union Institute; University of Northern California, Lorenzo Patino School of Law; University of Phoenix, Sacramento; Western Seminary

Data Source: California Postsecondary Education Commission

Sutter County includes the incorporated cities of Live Oak and Yuba City.



Data Source: California Department of Finance, E-5 Population and Housing Estimates, and 2007 Long-Term Socio-Economic Forecasts by County
Notes: Current/historical figures represent January 1 estimates for the year specified.

Data Source: California Department of Finance, E-5 Population and Housing Estimates.
Notes: Data represent January 1 estimates for the year specified. Differences due to rounding.

Data Source: California Employment Development Department, Annual Average Employment by Industry Data.
Note: Differences due to rounding. * Data not yet available for 2007.

Data Sources: Bureau of Economic Analysis

Notes: Employment numbers are full-time equivalents except where otherwise noted.

Data Source: US Census Bureau, American Community Survey 2006.
Note: Data represent that of workers aged 16+.

Data Source: California Department of Education, DataQuest.

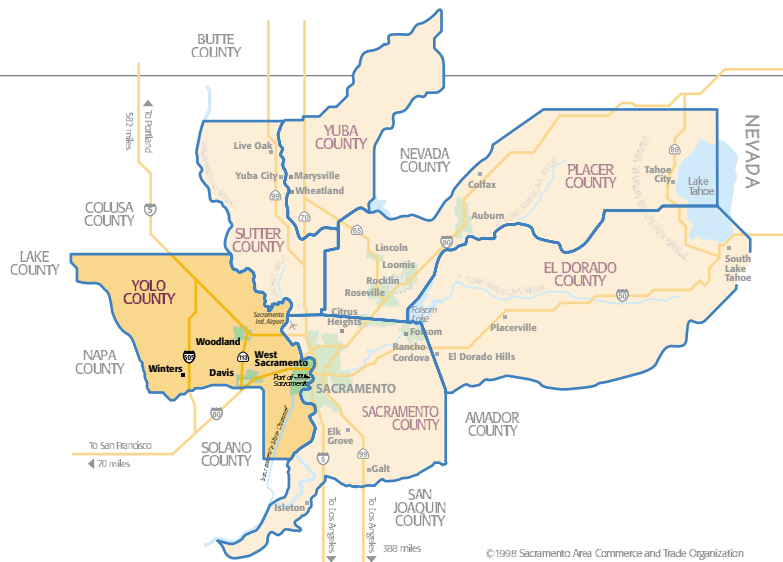
Data Source: California Department of Education, DataQuest.

Data Source: California Department of Education, DataQuest.

Data Source: California Postsecondary Education Commission

Yolo County

Yolo County includes the incorporated cities of Davis, West Sacramento, Winters, and Woodland.



	ABSOLUTE CHANGE				% CHANGE	
	1998	2008	2018	1998–2008	2008–2018	
Population	160,733	199,066	232,655	38,333	33,589	23.8% 16.9%

Data Source: California Department of Finance, E-5 Population and Housing Estimates, and 2007 Long-Term Socio-Economic Forecasts by County.
Notes: Current/historical figures represent January 1 estimates for the year specified.

	ABSOLUTE CHANGE				% CHANGE	
	1998	2003	2008	2003–2008	1998–2008	
Housing Units	59,112	65,523	73,138	7,615	14,026	11.6% 23.7%

Data Source: California Department of Finance, E-5 Population and Housing Estimates.
Notes: Data represent January 1 estimates for the year specified. Differences due to rounding.

	ABSOLUTE CHANGE				% CHANGE	
	1997	2002	2007	2002–2007	1997–2007	
Employment	81,900	93,200	*			

Data Source: California Employment Development Department, Annual Average Employment by Industry Data.
Note: Differences due to rounding. * Data not yet available for 2007.

2006 per Capita Income	\$31,990
2007 Median Home Price	\$389,000

Data Sources: Bureau of Economic Analysis, California Association of Realtors®, DataQuick Information Systems

MAJOR NON-GOVERNMENT EMPLOYERS	# OF EMPLOYEES
Cache Creek Casino Resort	2,420
United Parcel Service	1,251
Target	1,176
Raley's	834
Woodland Healthcare (CHW)	752
Wal-Mart Stores Inc.	712
Rex Moore Electrical Contractors & Engineers	700
Sutter Davis Hospital (Sutter Health)	661
Pacific Gas and Electric Co.	634
Rite Aid Corp.	500

Data Source: Sacramento Business Journal Top 25 Book of Lists 2007.
Note: Employment numbers are full-time equivalents except where otherwise noted.

MEAN COMMUTE TIME (2006)	AVERAGE MINUTES
County	20.1
State	26.8

Data Source: US Census Bureau, American Community Survey 2006.
Note: Data represent that of workers aged 16+.

PUBLIC EDUCATION	2007–2008 ENROLLMENT
K–12	29,528

Data Source: California Department of Education, DataQuest.

2006–2007 AVERAGE SAT SCORES	TOTAL
County	1,616
State	1,497

Data Source: California Department of Education, DataQuest.
Note: Total SAT scores include average verbal, math, and writing scores.

SCHOOL DISTRICTS INCLUDED
Davis Joint Unified, Esparto Unified, Washington Unified, Winters Joint Unified, Woodland Joint Unified

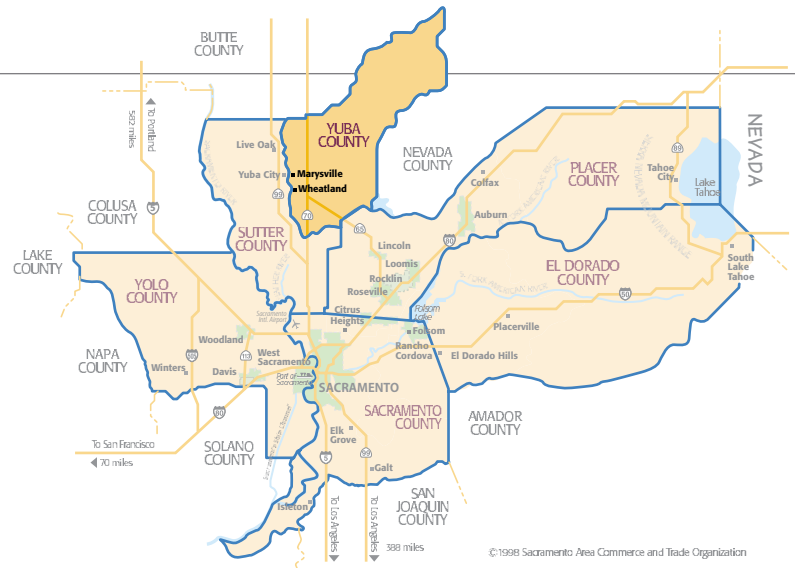
Data Source: California Department of Education, DataQuest.

COLLEGES AND UNIVERSITIES
University of California, Davis; Woodland Community College; WyoTech

Data Source: California Postsecondary Education Commission

Yuba County

Yuba County includes the incorporated cities of Marysville and Wheatland.



	ABSOLUTE CHANGE				% CHANGE	
	1998	2008	2018	1998-2008	2008-2018	
Population	61,419	71,929	101,726	10,510	29,797	17.1% 41.4%

Data Source: California Department of Finance, E-5 Population and Housing Estimates, 2007 Long-Term Socio-Economic Forecasts by County.

Notes: Current/historical figures represent January 1 estimates for the year specified.

	ABSOLUTE CHANGE				% CHANGE	
	1998	2003	2008	2003-2008	1998-2008	
Housing Units	22,476	23,061	27,672	4,611	5,196	20.0% 23.1%

Data Source: California Department of Finance, E-5 Population and Housing Estimates.

Notes: Data represent January 1 estimates for the year specified. Differences due to rounding.

	ABSOLUTE CHANGE				% CHANGE	
	1997	2002	2007	2002-2007	1997-2007	
Employment	17,400	16,900	*			

Data Source: California Employment Development Department, Annual Average Employment by Industry Data.

Note: Differences due to rounding. * Data not yet available for 2007.

2006 per Capita Income	\$23,634
2007 Median Home Price	N/A

Data Sources: Bureau of Economic Analysis

MAJOR NON-GOVERNMENT EMPLOYERS	# OF EMPLOYEES
Rideout Memorial Hospital (Fremont-Rideout Health Group)	2000
Wal-Mart Stores Inc.	450
Sierra Kiwi, Inc.	250
Bishop's Pumpkin Farm	200
Appeal-Democrat	150
Comprehensive Security Service, Inc.	108
D & D Cabinets	100
American Postal Workers Union	100
Homewood Truss	80
KBI Norcal Truss	12

Data Source: Yuba-Sutter Economic Development Corporation and ReferenceUSA.

Notes: Employment numbers are full-time equivalents except where otherwise noted.

MEAN COMMUTE TIME (2006)	AVERAGE MINUTES
County	30.3
State	26.8

Data Source: US Census Bureau, American Community Survey 2006.

Note: Data represent that of workers aged 16+.

PUBLIC EDUCATION	2007-2008 ENROLLMENT
K-12	14,659

Data Source: California Department of Education, DataQuest.

2006-2007 AVERAGE SAT SCORES	TOTAL
County	1,381
State	1,497

Data Source: California Department of Education, DataQuest.

PUBLIC SCHOOL DISTRICTS INCLUDED
Camptonville Elementary, Marysville Joint Unified, Plumas Lake Elementary, Wheatland Elementary, Wheatland Union High

Data Source: California Department of Education, DataQuest.

COLLEGES AND UNIVERSITIES
Yuba College, Embry-Riddle Aeronautical University, University of Phoenix

Data Source: California Postsecondary Education Commission

Sacramento Region Kudos

Folsom named one of seven California communities on the *Fortune Small Business* list of 100 Best Places to Live and Launch a Business (2008)

Roseville included on *Money* magazine's list of Top 100 "Best Places to Live" (2008)

Ten Best Cities of 2008 by Kiplinger's *Personal Finance* (2008)

12th-Best Carbon Footprint of residents in 100 major U.S. metropolitan areas by The Brookings Institution (2008)

Davis named one of America's Five Friendliest Cities by *TodayShow.com* (2008)

Ranked 3rd on Top 10 list of Digitally Savvy Cities in the U.S. by Scarborough Research Study (2008)

"America's 10 Fastest-Growing Cities" by *Forbes.com* (2007)

Ranked 15th on *Inc. Magazine's* "Best Cities for Doing Business" (2007)

Top 10 Underrated U.S. Cities by *MSNBC.com* (2007)

Ranked 17th on *Bizjournals.com's* list of 66 Large Metros for Young Adult Job Seekers (2007)

Top 10 Fast Cities (emerging hubs for creative talent) by *Fast Company* (2005)

Ranked 15th by *Forbes Magazine* "America's Best Metros for Singles" (2005)

7th-Healthiest City in America by *BestPlaces.net* (2005)

Top 20 Tech Cities by *Popular Science* (2005)

Ranked 5th on U-Haul List of Destination Cities (2005)

Top 50 Entrepreneurial Cities by *Entrepreneur Magazine* (2005)

Ranked 11th on *Business 2.0's* top 20 list of Boom Towns in the U.S. (2004)

15th-Best Economy in the U.S. by *The Milken Survey* (2004)

Ranked 1st in America's Most Livable Communities by *Partners for Livable Communities* (2004)

Top 20 U.S. Cities for Small Business by *Money Magazine* (2003)

Top 20 Cities to Live and Work by *Money Magazine* (2003)

America's Most Diverse City by *Time Magazine* (2002)

Ranked 11th by *Forbes Magazine* "Best Places to do Business" (2000)

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